



# TRIAD



# IS



# PRIME

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## PRESS RELEASE

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### **Amazon Completes Search for Amazon HQ2 – North Carolina's Piedmont Triad Chosen for Second Headquarters**

SEATTLE – (BUSINESS WIRE) – December 1, 2017 – (NASDAQ: AMZN) – Amazon today announced its plans to open Amazon HQ2 in North Carolina's Piedmont Triad region.

After an extensive North American search, Amazon has chosen the Piedmont Triad cities of Greensboro, High Point, and Winston-Salem for its second company headquarters.

Amazon expects to invest over \$5 billion in construction and grow this second headquarters to include as many as 50,000 high-paying jobs. In addition to Amazon's direct hiring and investment, construction and ongoing operation of Amazon HQ2 are expected to create tens of thousands of additional jobs and tens of billions of dollars in additional investment in Winston-Salem, Greensboro, High Point, and surrounding communities.

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#### **Why Amazon believes North Carolina's Piedmont Triad is "Prime" for HQ2**

High Point, Greensboro, and Winston-Salem are the urban core of the Piedmont Triad region of central North Carolina.

- The Winston-Salem Metropolitan Statistical Area and adjacent Greensboro-High Point MSA are together the nation's 37th largest metro area, with a population exceeding 1.6 million.
- The three dynamic cities embody innovation, entrepreneurship, and creativity, while valuing their traditions and culture.

Amazon CEO Jeff Bezos says his company chose Central North Carolina for HQ2 for these differentiating regional assets.

1. The region's excellence in workforce readiness is apparent. There are more than 100,000 students in higher education along with a concentration of African-American students. A unique strength is the number of engineering and computer science students. As Bezos has

often said, "diversity in education and the preparedness of the workforce for the future continues as a strategic priority for Amazon." The Piedmont Triad clearly fulfills that priority.

2. The region has an exceptional diversity of geography, allowing for employees to "dream to live" and enjoy a wide-range of housing options within a 30-minute commute.
3. The Piedmont Triad offers six superior sites – ranging from downtown locations to impressive business parks – to choose among.

Bezos says, "The Piedmont Triad impressed us as an urban area where our employees will particularly enjoy living, with numerous outdoor recreational options and considerable natural beauty. Our employees will find housing that is affordable, and our company will find a cost-of-doing-business that is excellent."

"With its manufacturing traditions, the region's workforce is accustomed to hard work – and we'll be taking advantage of that tradition as we hire our team," he adds.

"It was clear to us that the three cities work well together," Bezos says. "They take a particular pride in their diversity, which appeals to Amazon's ethos."

#### **DIVERSITY in its geography**

- Winston-Salem, Greensboro, and High Point are surrounded by suburban and rural communities no more than 30 minutes away from the urban core. The geographic diversity allows for Amazon employees to live in urban lofts, walkable and close-in neighborhoods, suburban neighborhoods, rural communities – or even on horse farms.
- The Piedmont Triad region is halfway between the **Raleigh-Durham** MSA and the **Charlotte** MSA. High Point, Winston-Salem, and Greensboro have synergy with those adjacent metro areas. The Piedmont Triad is also halfway between Washington and Atlanta as well as halfway between Boston and Miami.

#### **DIVERSITY in its college students, educational institutions, and research parks**

With a wide range of educational assets, Amazon will be able to secure a rich pipeline of prospective employees.

- The High Point, Winston-Salem, and Greensboro region has 21 colleges, universities, and community colleges with more than 100,000 enrolled students.
- For the past 14 consecutive years, NC A&T State University (a historically-black university) and its College of Engineering has ranked #1 in the nation for the number of degrees awarded to African-Americans at the undergraduate level in the U.S.
- For at least nine consecutive years, NC A&T has been the leading producer of African-American female engineers at the baccalaureate level in the U.S.
- Winston-Salem State University (a historically-black university) has an impressive Department of Computer Science that offers BS and MS degrees in both computer science and information technology.
- A thriving life sciences and biotechnology sector is buoyed by two growing research parks: the Gateway University Research Park and Wake Forest Innovation Quarter. Those parks are joined by a regional office for the North Carolina Biotechnology Center and the renowned Wake Forest University School of Medicine.
- The Wake Forest University Institute for Regenerative Medicine is an international leader in the use of regenerative medicine to repair or replace diseased tissues and organs. Its scientists were the first in the world to successfully implant a laboratory-grown organ into a human. Today the institute is working to grow more than 22 different organs and tissues.

- High Point University has just opened the region's first school of pharmacy. The pharmacy school, physical therapy school, and physician assistant program are housed in a new \$120 million building designed for 700 health sciences graduate students.
- The Joint School of Nanoscience and Nanoengineering – a collaboration between NC A&T State University and UNC-Greensboro – is the flagship research institution at Gateway University Research Park. The Joint School offers master's and doctoral degrees in nanoscience and nanoengineering. Its research activities are concentrated on emerging trends in nanobiology, nanomaterials, nanometrology, and nanobioelectronics.
- The University of North Carolina School of the Arts is a professional, nationally-recognized school for the performing, visual, and moving image arts. It grants high school, undergraduate, and graduate degrees.

#### **DIVERSITY in its industry sectors**

- Greensboro, High Point, and Winston-Salem are known for their traditional industries of furniture, textiles, and tobacco. All remain important to the regional economy.
- High Point is the Furniture Capital of the World™ – which dovetails with Amazon's heightened interest in furniture. Amazon sends more than 150 company reps to the High Point Market, the world's largest furniture trade show.
- Today, these industry sectors have grown impressively.
  - **specialized business services / corporate offices** (according to a 2016 study by the national firms DCI and Garner Economics, companies in the specialized business services target industry sector are drawn here due to excellent broadband availability and speed; availability of suitable office space; significant number of graduates from business and computer science programs at local colleges; low cost of living relative to peer regions; and strong quality-of-place assets)
  - **supply chain and logistics** (according to that same study, companies in the supply chain and logistics target industry sector are here due to the central location for regional, national, and international markets; access to interstate highways and rail service; air freight facilities at Piedmont Triad International Airport; ability to employ the existing workforce for these jobs; and availability of secondary and post-secondary training)
  - **aviation / aerospace**
  - **innovation manufacturing**
  - **financial services**
  - **health care and life sciences**
  - **arts and design**
  - **data centers**

#### **DIVERSITY in its workforce and in its population**

- Winston-Salem, High Point, and Greensboro have a regional labor force of more than 800,000:
  - by gender: 50.3% female, 49.7% male;
  - by age: 29 or younger, 21%; 30-54, 55.4%; 55 or older, 23.6%;
  - by education levels: some college/associate degree, 25%; bachelor's or advanced degree, 18%.
- The ethnic breakdown of the three cities is: 52.6% white, 37.6% black or African American, 10.8% Hispanic or Latino, 4.0% Asian, and 5.7% other.
- The region has three historically-black colleges and universities – NC A&T State University, Winston-Salem State University, and Bennett College for Women.

- LGBT groups include Pride Winston-Salem and two chapters of Parents, Families, and Friends of Lesbians and Gays (PFLAG). On campuses are the Wake Forest University LGBTQ Center, Guilford College GLBTQA Resource Center, and Elon University's Gender & LGBTQIA Center. In addition, the Greensboro Green Foundation "creates unity through programming and philanthropy that advances equality and inclusion for LGBT communities – addressing existing and emerging needs in urban and rural communities throughout the Piedmont Triad."
  - Guilford Green is the only LGBT community foundation in the Southeastern U.S.
  - Greensboro Mayor Nancy Vaughan is the executive director of the Foundation.
- Hispanic groups include the Piedmont Triad Chapter of the North Carolina Society of Hispanic Professionals, the Hispanic League, the Latino Community Coalition of Guilford County, and more.
- Approximately ten percent of Guilford County's population is foreign born, and its public school system has 99 different languages or dialects spoken at school.
- For the last three years, Greensboro has hosted the National Folk Festival. According to its website, "The Festival embraces the heritage and traditions of all Americans—from those whose families have been here for centuries or millennia to those who have more recently arrived on our shores. Prepare to be wowed as both legendary masters and the next generation of dynamic, young artists celebrate America's musical soul and cultural roots."

#### **DIVERSITY in its international visitors and businesses**

- More than 225 companies in the region are internationally based – in such fields as aerospace, school buses, hydraulic excavators, furniture, non-woven textiles, chemicals, heating and air conditioning products, and much more.
- The High Point Market – the world's largest home furnishings trade show – brings approximately 14,000 foreign guests each year to the region. Those visitors represent more than 110 countries.

#### **DIVERSITY in culture, focus, and leisure activities**

- Winston-Salem is known as the *City of Arts and Entertainment*; Greensboro, as *Tournament Town* for its Atlantic Coast Conference sporting championships; and High Point, as *Furniture Capital of the World*<sup>TM</sup>.
- The cities host the Wyndham Championship PGA Tournament; the Winston-Salem Dash and Greensboro Grasshoppers minor-league baseball teams; cycling championships; Winston-Salem Open Tennis Tournament; NASCAR Weekly Racing Series; Men's and Women's ACC basketball tournaments; and BMX Racing.
- Athletic and entertainment venues include the 23,000-seat Greensboro Coliseum, Special Events Center and White Oak Amphitheatre; 12,000-seat Lawrence Joel Veterans Memorial Coliseum; BB&T Ballpark and First National Bank Field (minor league parks); Atlantic Coast Conference Hall of Champions; Greensboro Aquatic Center; Aggie Stadium, Bowman Gray Stadium, Irwin Belk Track, Gene Hooks Field at Wake Forest Baseball Park, BB&T Field; and the Miracle League of High Point Field.
- Performance arts events include the John Coltrane International Jazz & Blues Festival, Eastern Music Festival, Black Theatre Festival, RiverRun International Film Festival, Greensboro Symphony Orchestra, and Winston-Salem Symphony.
- Performance arts venues include the Stevens Center, Carolina Theatre, High Point Theatre, UNC-Greensboro Auditorium, Hayworth Fine Arts Center, Triad Stage, and the under-construction Steven Tanger Center for the Performing Arts.

- Attractions and museums include the International Civil Rights Center and Museum, Historic Old Salem, Triad Park Field of Honor, Winston-Salem Downtown Arts District, High Point Museum, Weatherspoon Art Museum, Guilford Courthouse National Military Park, Greensboro Science Center, Carolina SciQuarium, SciWorks, Greensboro Children's Museum, Children's Museum of Winston-Salem, and Greensboro Historical Museum.
- The NC Zoological Park, the nation's largest natural-habitat zoo, is nearby in Asheboro, NC.
- The region's cities offer a wide range of restaurants and breweries at all price points. Two culinary schools help train chefs and other hospitality industry workers.

#### **DIVERSITY is why Amazon chose Greensboro, High Point, and Winston-Salem for HQ2**

- Amazon chose the region for the diversity it offers the company, and also for the diversity the company offers Winston-Salem, Greensboro, and High Point.
- The Piedmont Triad region was among the hardest hit in the 2008 national recession, as it lost many manufacturing jobs in addition to the thousands of positions that had gone offshore earlier.
  - The area is known for its factories and mills – doing business in furniture, textiles, and tobacco. Many of those mills went empty, some remain unused, and still others have been razed. Several factories, though, have been restored for retail, housing, and new business uses.
  - Leaders have been remaking the region and have been successful at growing a host of new industry sectors. HQ2 will bring economic diversity to the Piedmont Triad region.
  - Amazon's employees – and the company's focus on diversity – will impressively increase the region's workforce and population diversity.
- But what will Amazon gain from locating there?
  - Amazon will have three urban communities working closely together that will support and embrace the company.
  - Amazon will have an East Coast location where the company will be the largest regional employer and will be among a host of diverse internationally-known and successful companies that have also chosen the Piedmont Triad – companies such as Ralph Lauren Corporation, Honda Aircraft, FedEx and its Mid-Atlantic Air Hub, Volvo, Hanesbrands, Daimler, Bank of America, Caterpillar, Deere Hitachi, HAECO Americas, BB&T, Alorica, Wells Fargo, and many more.

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Stan Kelly, president of the Piedmont Triad Partnership, says “Amazon is guided by four principles: customer obsession rather than competitor focus, passion for invention, commitment to operational excellence, and long-term thinking. The company will find that the Piedmont Triad region of North Carolina embraces those principles.”

“We are pleased that Amazon recognizes our region’s impressive ‘sense of place’ and wants to grow with us,” says Brent Christensen, president of the Greensboro Chamber of Commerce.

Bob Leak, president of Winston-Salem Business, Inc., adds, “Amazon saw that the Triad’s lifestyle culture and corporate culture will mesh well with the company and its approach.”

“Amazon bringing HQ2 to our region will give us a new catchphrase – the Piedmont Triad will be going from ‘old mills to new skills’,” says Loren Hill, president of the High Point Economic Development Corporation.

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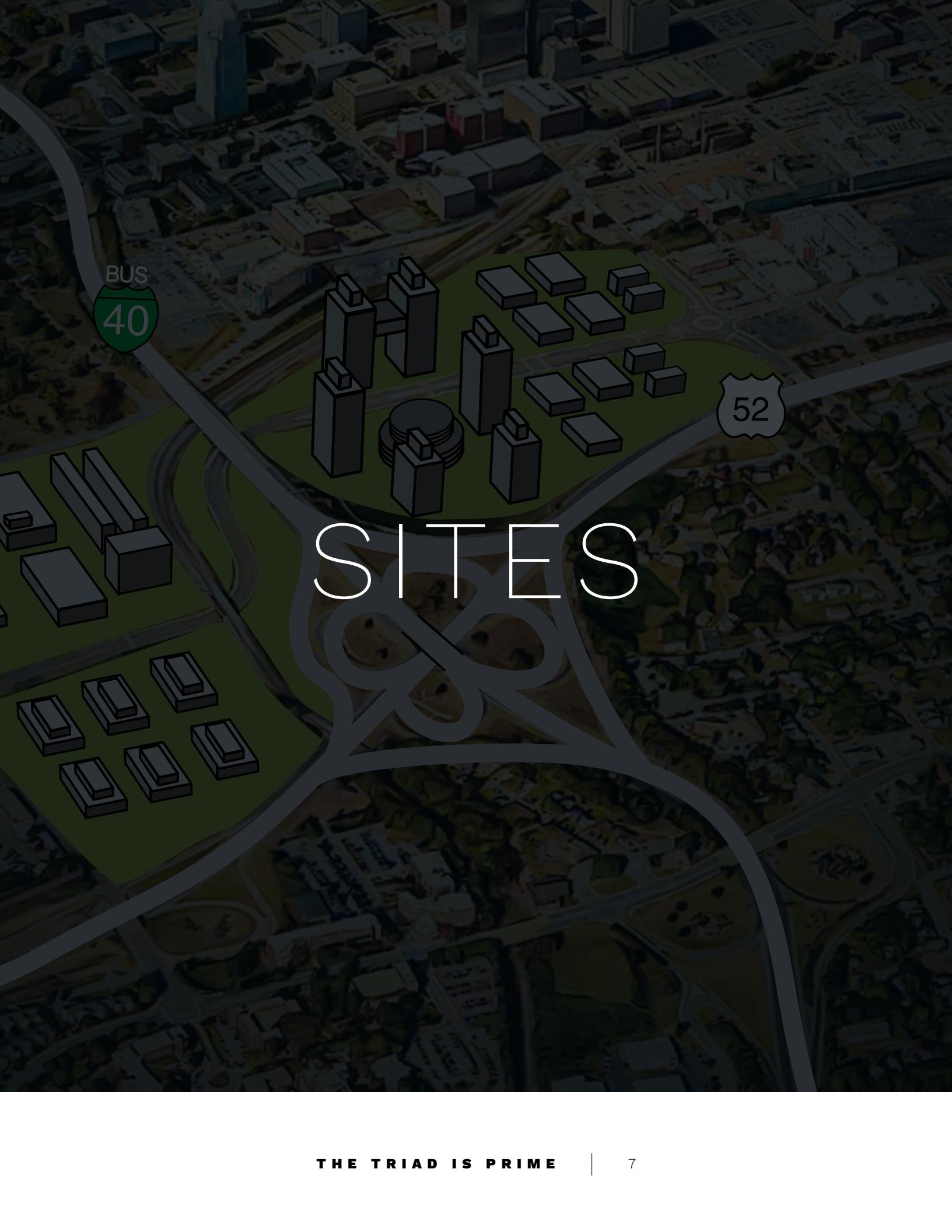
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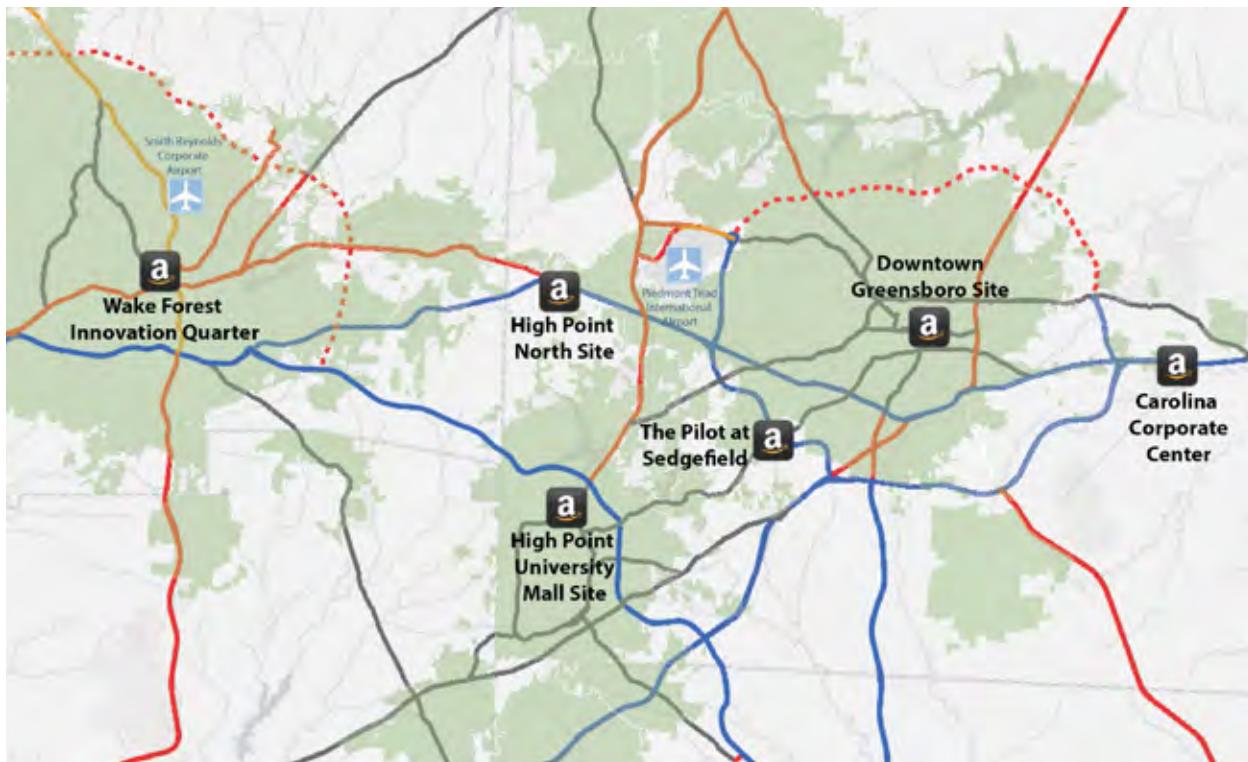
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# SITES

## Site Locations

The Triad region consisting of the urban centers of Greensboro, High Point and Winston-Salem propose the following sites for Amazon HQ2 to be conveyed at no cost to Amazon:



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1

**Wake Forest Innovation Quarter**

Winston-Salem

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2

**Downtown Greensboro**

Greensboro

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3

**High Point North Site**

High Point

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4

**Pilot at Sedgefield**

Greensboro

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5

**High Point University Mall Site**

High Point

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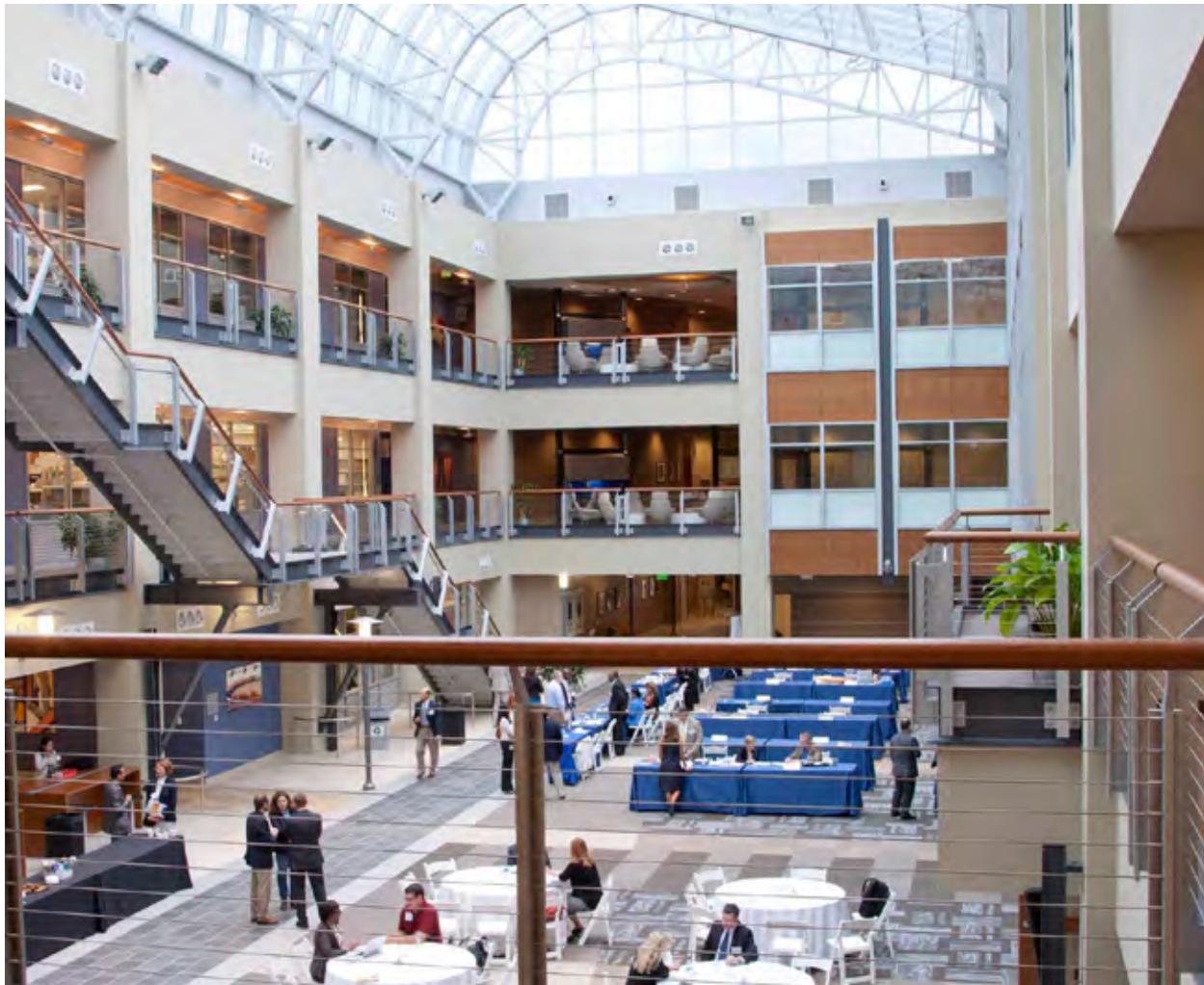
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**Carolina Corporate Center Site**

Greensboro

## Wake Forest Innovation Quarter

Winston-Salem



The Innovation Quarter site in Winston-Salem, NC is an 88-acre site situated around an unmatched mix of business, education, entertainment, and residential facilities. This site is nestled between two major highways with access to three airports within 90 miles. Abutting the central business district, the Innovation Quarter boasts walkability to restaurants, coffee shops, apartments, and craft breweries. Other companies within the Innovation Quarter include Wake Forest Baptist Medical Center, Inmar, Winston Salem State University, Forsyth Technical Community College and Wells Fargo.

## ALEXA... WHAT IS THE BEST LOCATION FOR AMAZON'S HQ2?

### INNOVATION QUARTER!

Located in downtown Winston-Salem, North Carolina, it has over 330 acres with 88 acres to grow.



Unique dovetailing of arts and technology innovation



### DOWNTOWN WINSTON-SALEM

features many restaurants, breweries, retail shops, museums, theaters, hotels, apartments, grocery stores, farmers market, and anything else you could ask for in a Downtown area.

4 breweries

5 theaters/museums

6 childcare centers

6 hotels

9 fitness centers

14 coffee shops

18 apartment complexes

28 salons/spas

69 restaurants

75 retail shops

 Wake Forest™  
innovation quarter

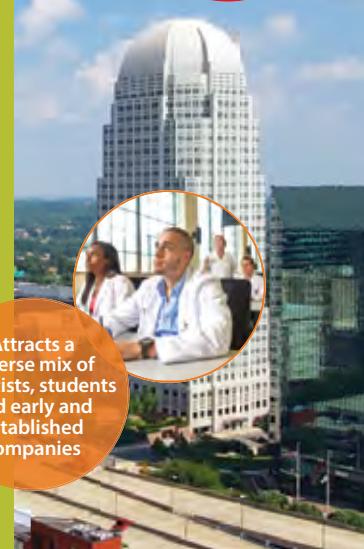
Winston-Salem, North Carolina

[innovationquarter.com](http://innovationquarter.com)

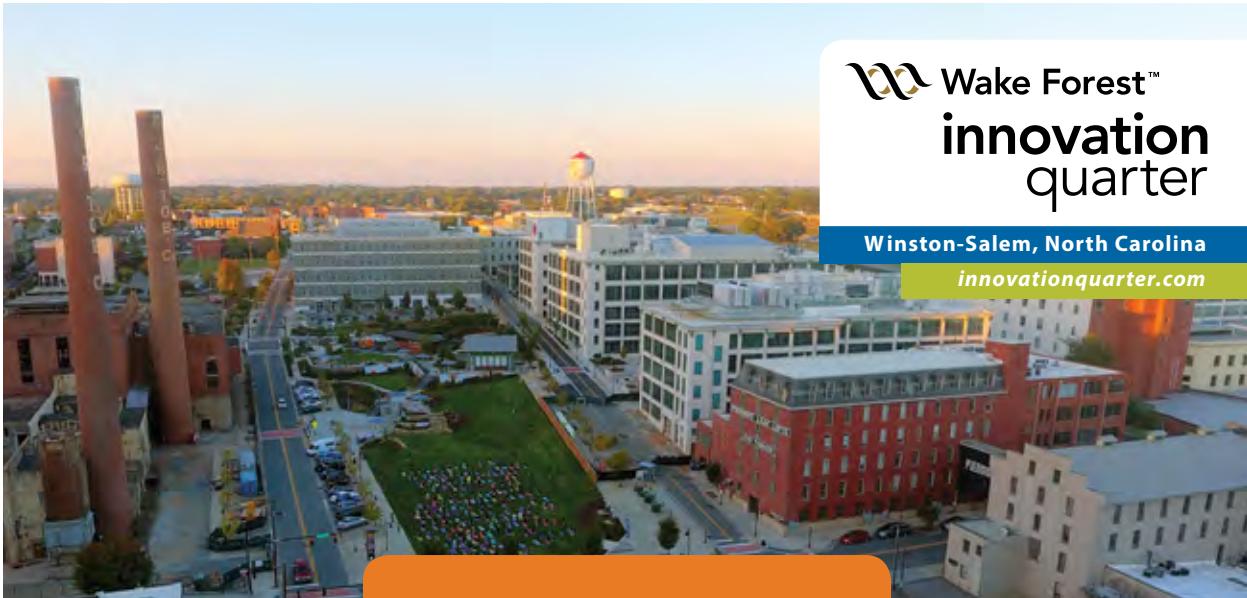


Central location with great access to Interstate 40 and Highway 52

Unmatched mix of business, education, entertainment and residential facilities



Attracts a diverse mix of scientists, students and early and established companies



 Wake Forest™  
**innovation  
quarter**

Winston-Salem, North Carolina

[innovationquarter.com](http://innovationquarter.com)

- More than 60 companies and four leading academic institutions to go along with 3,600 workers and 12,000 students.
- Wake Forest Institute for Regenerative Medicine
- Piedmont Triad office of the North Carolina Biotechnology Center
- Wake Forest School of Medicine

## INNOVATION QUARTER

**With its unusual blend of elements, the Innovation Quarter seeks to drive prosperity through building a vibrant and diverse community of innovators and entrepreneurs.**

**5 academic institutions**

**45 technology companies**

**88 acres for new investment**

**108 service companies**

**153 companies**

**1,522 degree students**

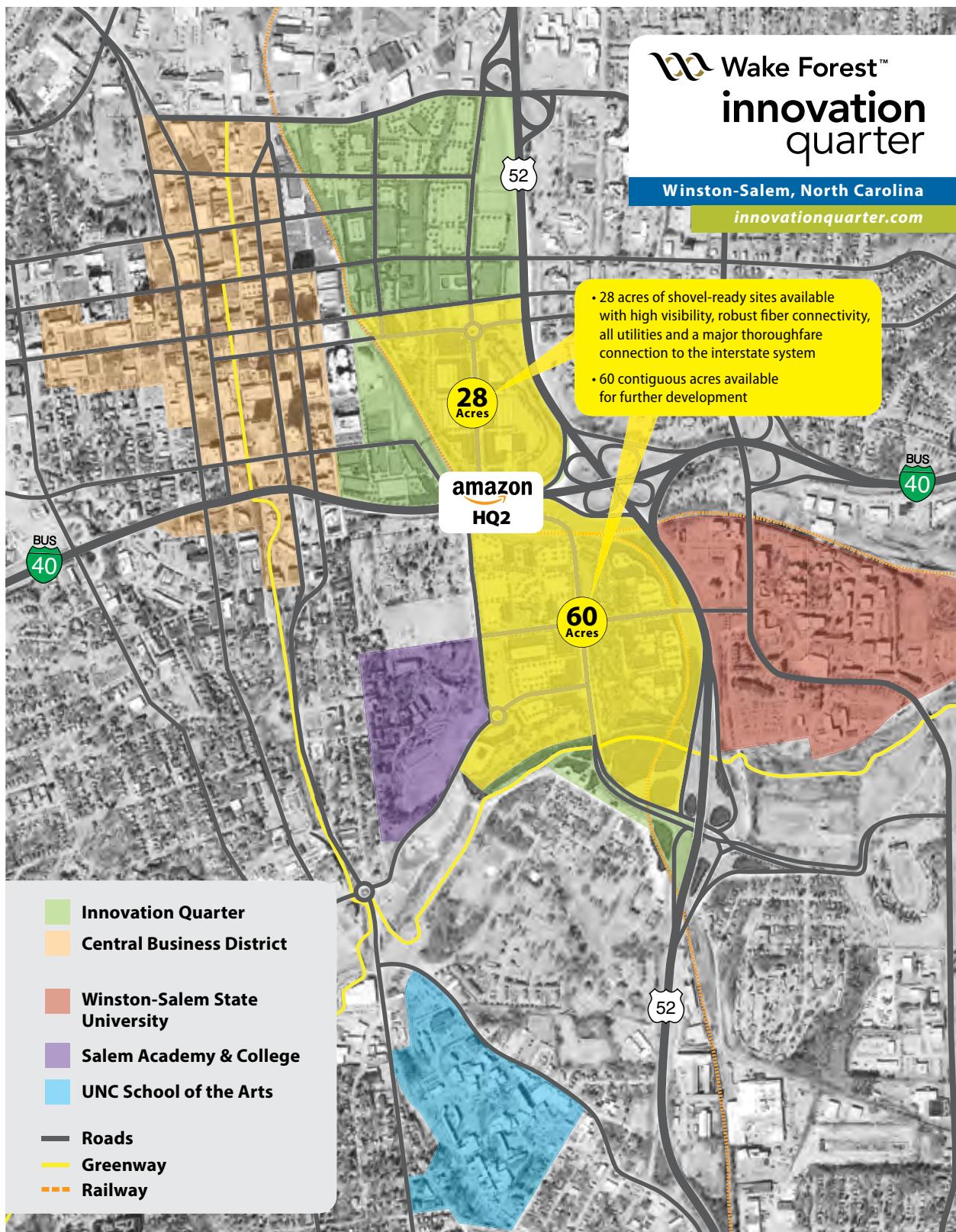
**9,878 workforce trainees**

**1.9 M sf of work space**

**\$789 M public/private investment**



- Wake Forest Biotech Place, a state-of-the-art multipurpose biotechnology research and innovation center developed by the Wexford Group
- Forsyth Tech has the largest biotech program of any community college in the state. Their Wells Fargo Nanotechnology Program is the only two-year program offered in the Southeast.
- Inmar Headquarters, a technology company that uses data from secure transactions across online and offline networks for their partners
- WSSU Biomedical Research Infrastructure Center focuses on biomedical/behavioral research programs.
- Wet Lab LaunchPad™, affordable laboratories with collaborative work spaces
- Bailey Park, a rails-to-trails linear park and lake



## Downtown Greensboro

Greensboro



*Image: Tim Jones*

A prime location in downtown Greensboro. Located across from NewBridge Bank Park, a 7,499 seat baseball stadium, and in close proximity to the planned Steven Tanger Center for the Performing Arts, as well as Center City Park and LeBauer Park, a combined 5-acre urban green space. Also located by the site is Carroll at Bellemeade, a new, mixed-use development featuring 300 upscale apartment homes, a Hyatt Place Hotel, two rooftop pools, and several desirable amenities. The site offers access to public transportation and the opportunity to locate in a significantly growing and changing downtown Greensboro.



DOWNTOWN  
GREENSBORO

city life, *reimagined.*

What can you find in downtown Greensboro? The better question is — what CAN'T you find in downtown Greensboro?! From arts and recreation to fitness and entertainment, *you'll find it all!*

VISITORS TO DOWNTOWN | **1.4 MILLION**

LOCALLY OWNED RETAILERS | **40**

BARS & RESTAURANTS | **70**

BREWERIES | **5**

DISTILLERIES | **1**

ARTS & CULTURAL INSTITUTIONS | **20**

PUBLIC ART PIECES | **41**

THEATER SEATS | **2,215**

\*3,000 in development

HOTEL ROOMS | **307**

\*300 in development

MEETING SPACE | **97,445 SQ FT**

PARKING SPACES | **7,000+**

OFFICE OCCUPANCY | **93.5%**

PRIVATE OFFICE SPACE | **2,759,426 SQ FT**

TOTAL NUMBER OF EMPLOYEES | **21,926**

POPULATION WITHIN ONE MILE | **13,136**

BACHELOR'S DEGREE OR HIGHER | **45%**

ENROLLED IN GREENSBORO  
COLLEGES & UNIVERSITIES | **49,517**

HOUSING UNITS | **1,612**

AVERAGE 1 BEDROOM RENT | **\$1,000**

RESIDENTIAL VACANCY RATE | **4.7%**

AVERAGE WALK SCORE | **85**

MILES OF GREENWAY | **4**

AMTRAK STOPS | **8**

Sources: CBRE Triad Market Overview, City of Greensboro, DGI, ESRI, U.S. Census Bureau

## High Point North Site (2 options)

High Point

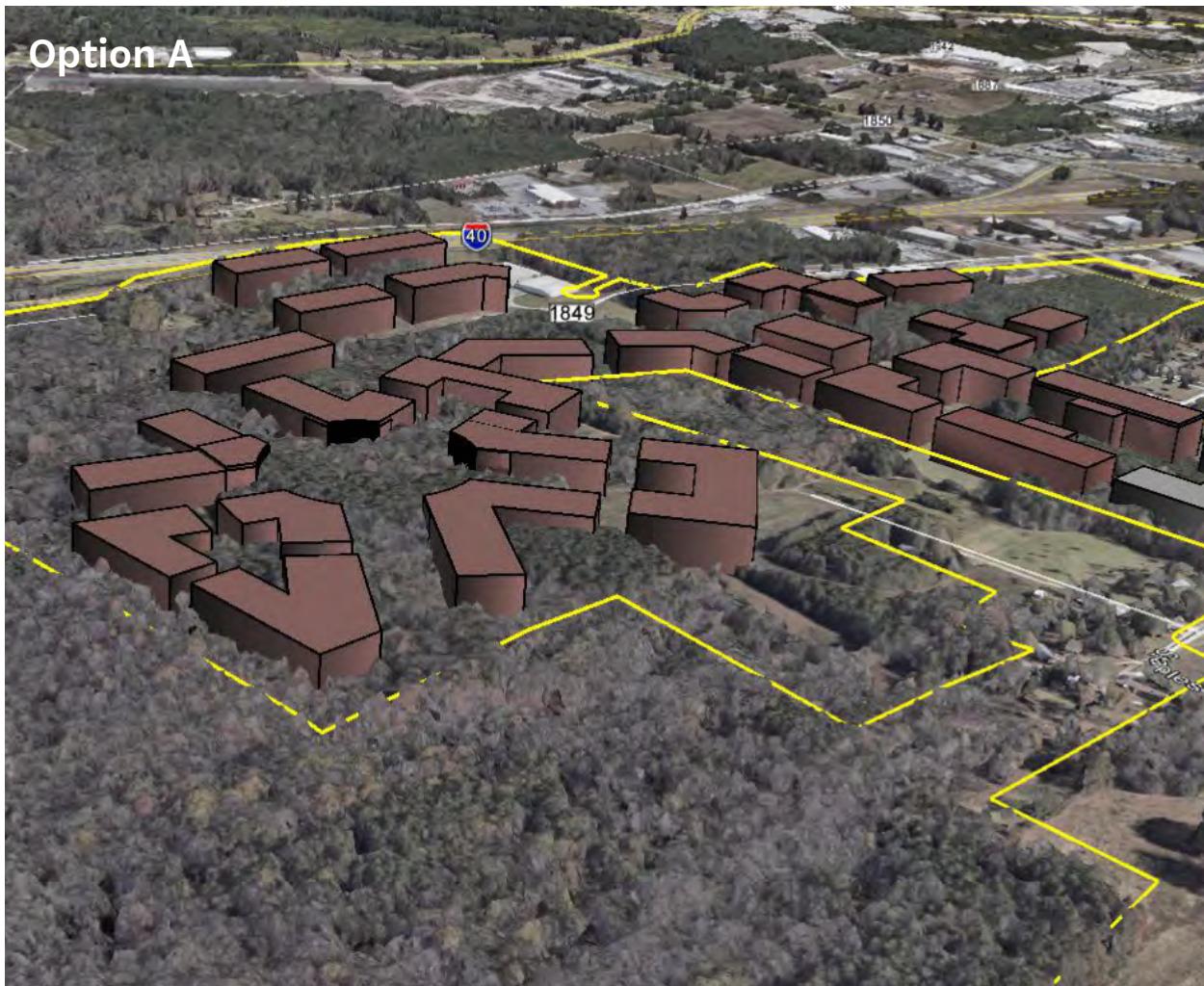
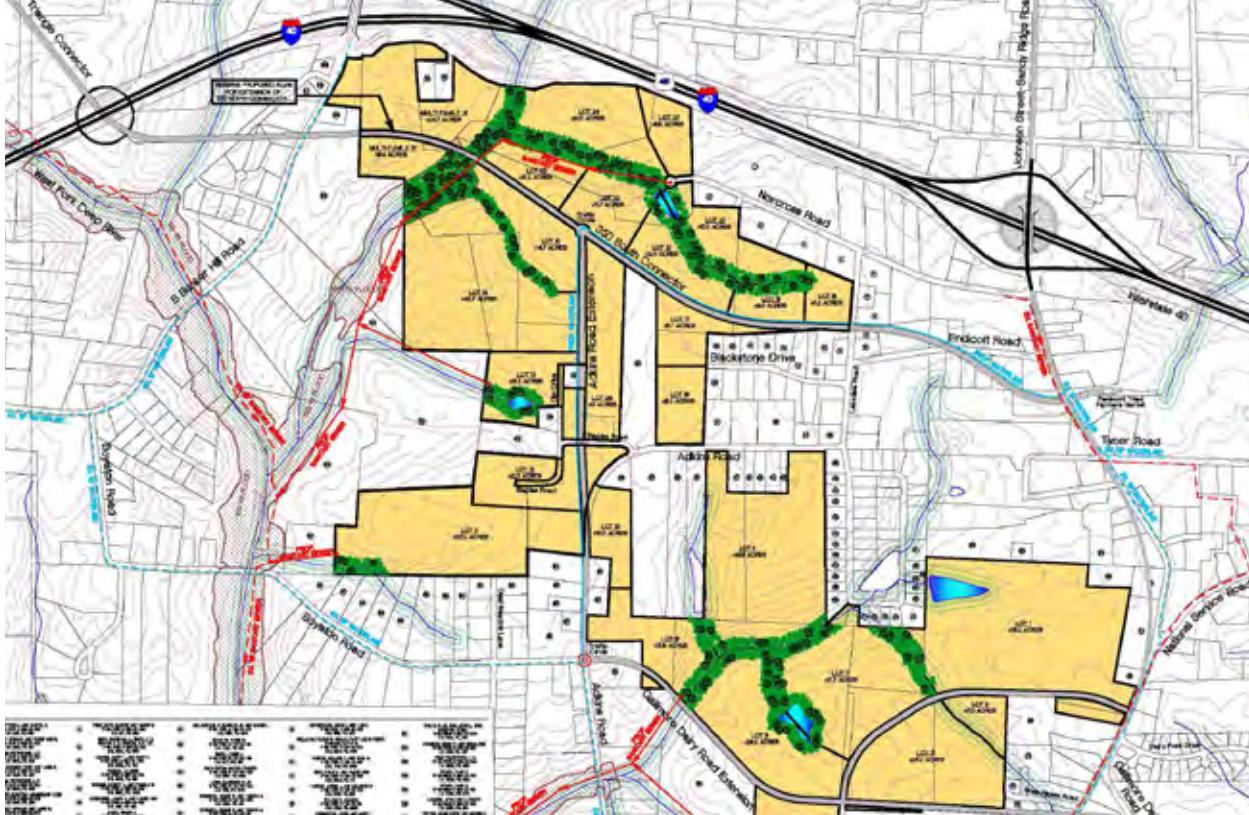
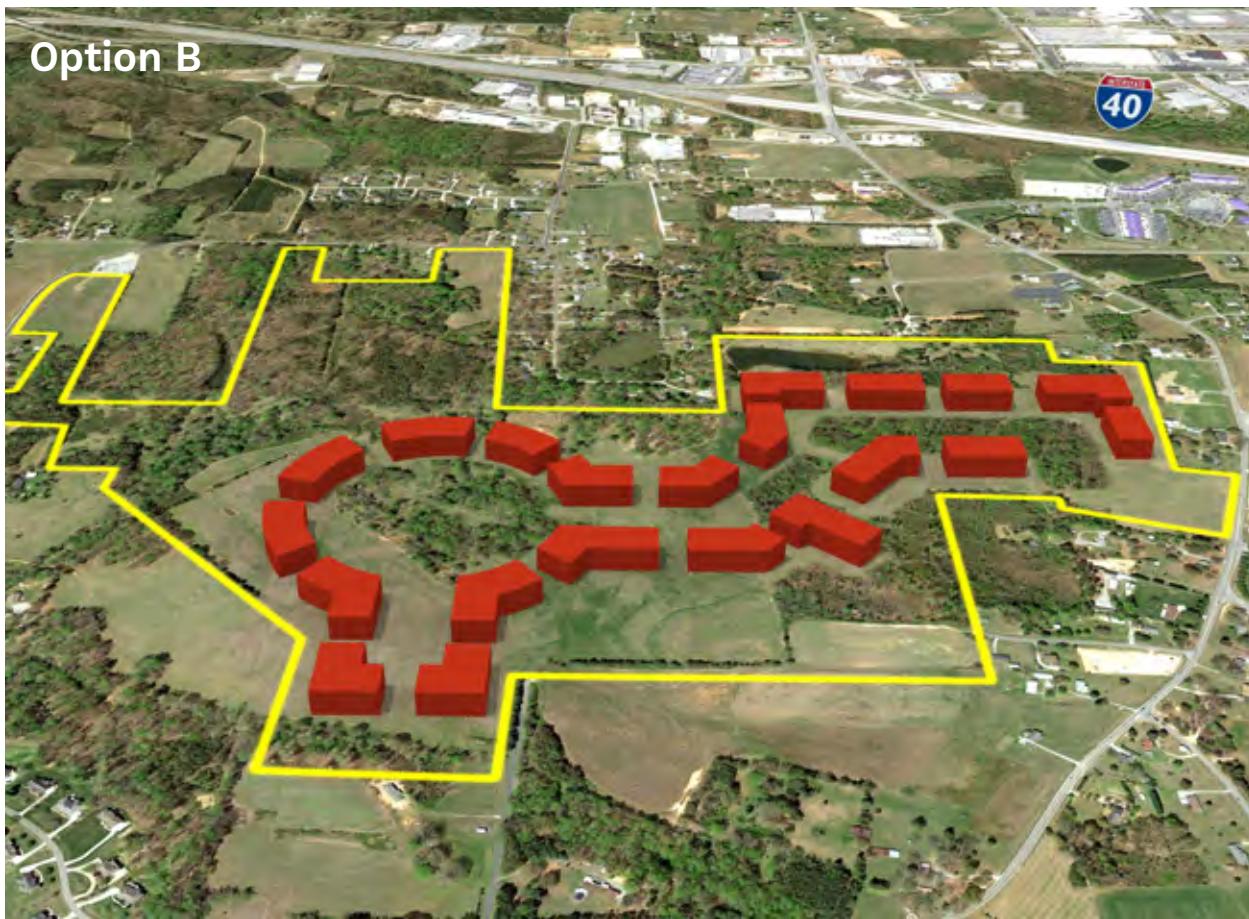


Image: Timmons Group

High Point North, is a 530-acre property in the middle of the Piedmont Triad of North Carolina. This site is located less than 11 minutes from Piedmont Triad International Airport and the FedEx Air hub and is only 4 minutes to the FedEx Ground Hub. The site is well located and is prime property in the Heart of the Triad. The site is close in proximity to downtown High Point and the showrooms of the International Home Furnishings Market. This site is in the middle of a population of over 1.6M people. Two site options are available to choose from, each of which can accommodate 8M sq ft.

## Option B



*Images: Timmons Group*

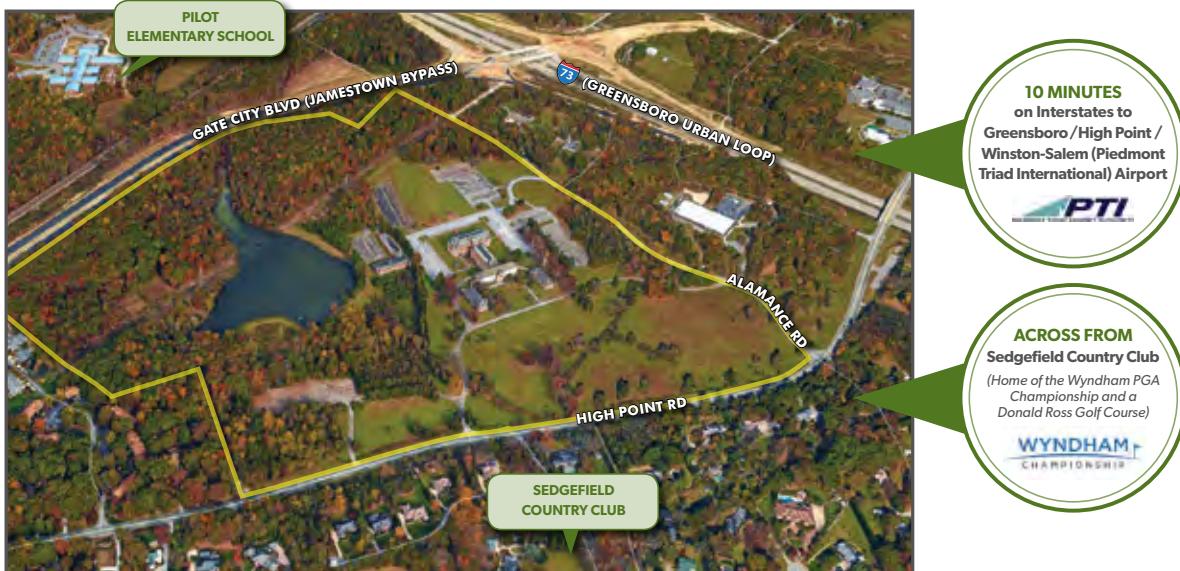
## Pilot at Sedgefield

Greensboro



Image: Timmons Group

Centrally located in North Carolina's growing urban core population and adjacent to a full interchange with I-73, The Pilot is fully entitled and ready for development. The Pilot at Sedgefield, previously the headquarters of Pilot Life Insurance Company (currently Lincoln Financial), offers 115 acres. Six buildings exist on the property, totaling 222,000 SF, and can be restored as an amenity for the entire development or all of the buildings can be demolished. The Pilot offers close proximity to the FedEx Mid-Atlantic Hub, Piedmont Triad International Airport, and many major employers.



<b>NO. 2</b> <b>Best State for Business</b>  <i>Forbes Magazine, October 2015</i>	<b>NO. 2</b> <b>Best Business Climate</b>  <i>Site Selection Magazine, November 2015</i>	<b>NO. 2</b> <b>Most Cost-Efficient for Manufacturing</b>  <i>AIER Study, The Business Journals, July 2011</i>	<b>NO. 3</b> <b>Lowest State &amp; Local Tax Burden on Business</b>  <i>Council on State Taxation and Ernst &amp; Young, August 2014</i>	<b>NO. 9</b> <b>Largest State Population</b>  9.8 Million
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TRANSPORTATION			
			
<b>FedEx Mid-Atlantic Hub</b> at Piedmont Triad International Airport	<b>High Speed Rail Corridor</b> between Washington, DC and Atlanta with stops in Greensboro. Five daily roundtrip trains between Charlotte and Raleigh all stop in Greensboro.	<b>Fiber Optic Spine</b> between Washington, DC and Atlanta passes through Greensboro.	<b>Ports / Distance</b> Norfolk, VA / 4 hours Morehead City, NC / 4 hours Wilmington, NC / 3 hours Charleston, SC / 4.5 hours Savannah, GA / 5 hours

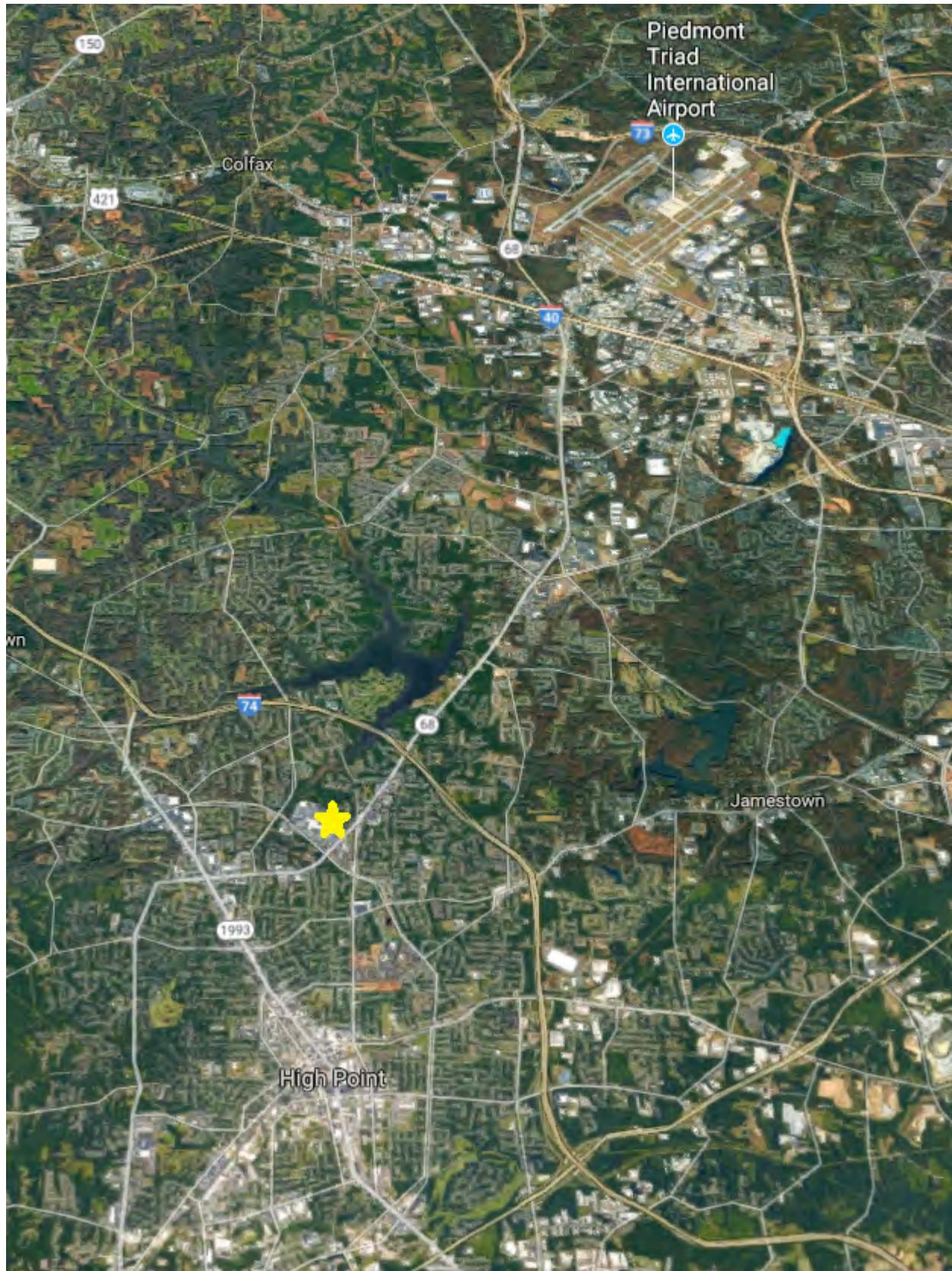
## High Point University Mall Site

High Point



*Image: Timmons Group*

High Point University's Mall site offers 52 acres with additional available properties surrounding the former Mall known as Oak Hollow. The Mall is currently owned by High Point University, is unoccupied, and is available to Amazon. This site is extremely well located – and is close in proximity to downtown High Point, Interstate 74, the showrooms of the International Home Furnishings Market and Piedmont Triad International Airport. This site is located centrally in an urban area in the middle of a population of over 1.6M people.



## Carolina Corporate Center Site

Greensboro



*Image: Timmons Group*

A Corporate Campus boasting 683,000 SF of existing space located in McLeansville, North Carolina. Set on over 137 manicured acres, this prime location between Greensboro and Burlington, North Carolina offers interstate frontage, a 750 KVA dedicated Duke Power substation, and City of Greensboro utilities. Carolina Corporate Campus offers AT&T and Charter/Spectrum fiber optic service providers by redundant SONET ring. Carolina Corporate Center offers close proximity to the region's workforce by way of Interstate 40/85.



Images: Timmons Group

# INCENTIVES



## Incentives

Greensboro, High Point and Winston Salem “The Triad” are prepared to convey to Amazon at no cost your choice of any of the submitted 6 sites. Greensboro, High Point and Winston Salem are also willing to participate in a full offering of incentives that would include cash grants based upon capital investments in personal property, real property and job creation. Training grants and investments in a transportation system will also be offered. Once a site is selected, we will work with Amazon to maximize the incentives available and to create a meaningful package of support.

- 1. Wake Forest Innovation Quarter site
- 2. High Point North site
- 3. High Point University Mall site
- 4. The Pilot at Sedgefield site
- 5. Downtown Greensboro site
- 6. Carolina Corporate Center site

## State Incentive Overview

The State of North Carolina has incentive programs for competitive projects to help offset costs to companies for locating or expanding businesses in the state.

The state’s flagship program, the Job Development Investment Grant (JDIG), is a performance-based, discretionary incentive that provides cash grants directly to new and expanding companies. The amount of the grant is based on a percentage of the personal income tax withholdings associated with the new jobs.

The amount of a JDIG award is calculated by weighing a number of factors to determine its potential value, including the location of the project, the county tier designation, the number of net new jobs, the wages of the jobs compared to the county average wage, the level of investment and whether the industry is one of the state’s targeted industry sectors.

Recently, changes have been made to enhance the JDIG program with the creation of a high-yield provision for any company that creates at least 1,750 jobs and invests at least \$500 million, as well as the creation of a transformative project provision for any company that creates at least 5,000 jobs and invests at least \$4 billion. These provisions allow for an award to include a higher withholdings tax percentage and a greater number of years that payments may be received.

If this project were to be treated as a single project with a 15-year ramp up of 50,000 jobs and a total investment of \$5 billion, an estimated JDIG award would be approximately \$2 billion. Such an award would require changes to the existing program statutes by the North Carolina General Assembly.

## Local Incentive Cash Grant Policies

Cities and Counties offer incentive programs based on capital investments in personal property, real property and job creation. Most investment programs have minimum requirements that the Amazon HQ2 project will far exceed regarding job creation and capital investment. The process is similar among local governments for approval of grants.

## Local Incentive Payments

- Annual Installments for a varied amount of years.
- Payment in any year will not exceed the City/County property tax levied and collected on the capital investment of the company during the year of payment.
- Incentive payments are granted and distributed after capital investments and job creation requirements have been achieved by the business and satisfactorily documented. Any business which is delinquent in its property tax obligation will not be eligible for County assistance.

## Calculation of Incentive Amounts

Incentive grants based on capital investment are calculated using capital investment schedules and the estimation of new taxes that will be collected once the project is completed. The actual incentive amount is based on a percentage of the total tax liability from estimated new taxes. The percentage and number of years to distribute cash grants varies by specific location.

## Eligibility

New Capital Investment	\$3,000,000 + depending on location
Job Creation	25+ depending on location
Wages & Benefits	Wages meet and exceed set levels or county average depending on location. Benefits include health insurance
Competition	Project must demonstrate competition from communities outside the region



## Approval Process & Timeline

Application	Formal application stating level of investment, job creation, schedule and other details
Closed Session(s)	Meet with local government council/commission in closed session(s) to review project details. Closed sessions are held on regular meeting dates of the elected body. After this step, the project will be recommended for public hearing or declined.
Public Hearing	Public hearing will be held to review the project in a public forum within regular meetings of the elected body. The project will be voted on during this session.
Contract	After incentives are approved, local government and corporate officials construct a contract detailing project and incentive structure and payments.

*The timeline of this process takes approximately 8 weeks depending on timing of information and regularly scheduled meetings.*

## Clawbacks

Failure to achieve investment and job targets established for the project will result in reduction of City/County payments and may require repayment of some or all City/County funds paid.



# LABOR

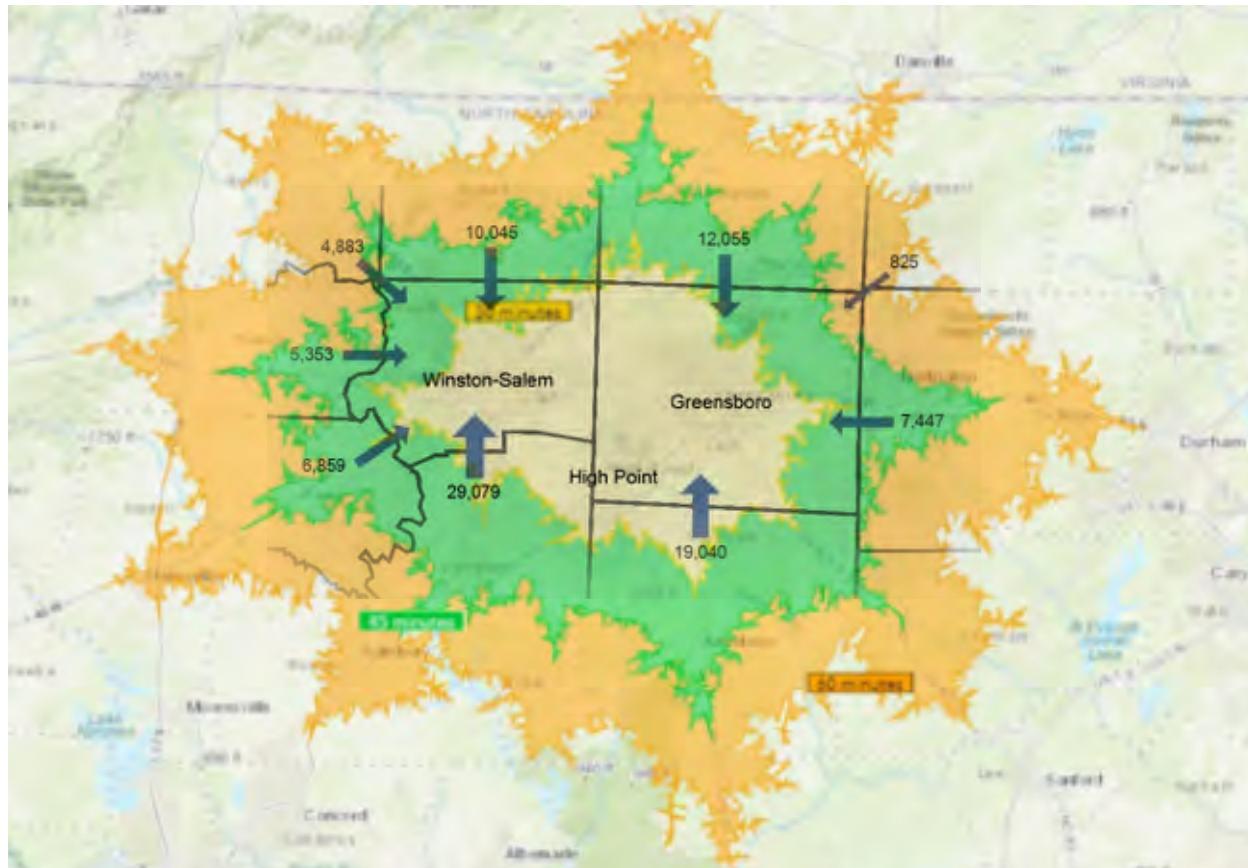


## Regional Employment

OCCUPATION CATEGORY	EMPLOYED IN REGION
<b>Executive/Management</b>	<b>55,288</b>
<b>Engineering &amp; Related</b>	<b>9,001</b>
Software Developers & Programmers	3,967
<b>Legal Occupations</b>	<b>4,274</b>
<b>Financial Specialists</b>	<b>11,185</b>
Accountants	4,969
<b>Office &amp; Administrative Support</b>	<b>110,531</b>
<b>TOTAL</b>	<b>199,215</b>

## Labor Pool

TRIAD REGIONAL LABOR FORCE	2015	2016
Labor Force	801,779	811,923
Employed	756,207	771,467
Unemployment	5.7%	5.0%



## Attracting Talent Regionally

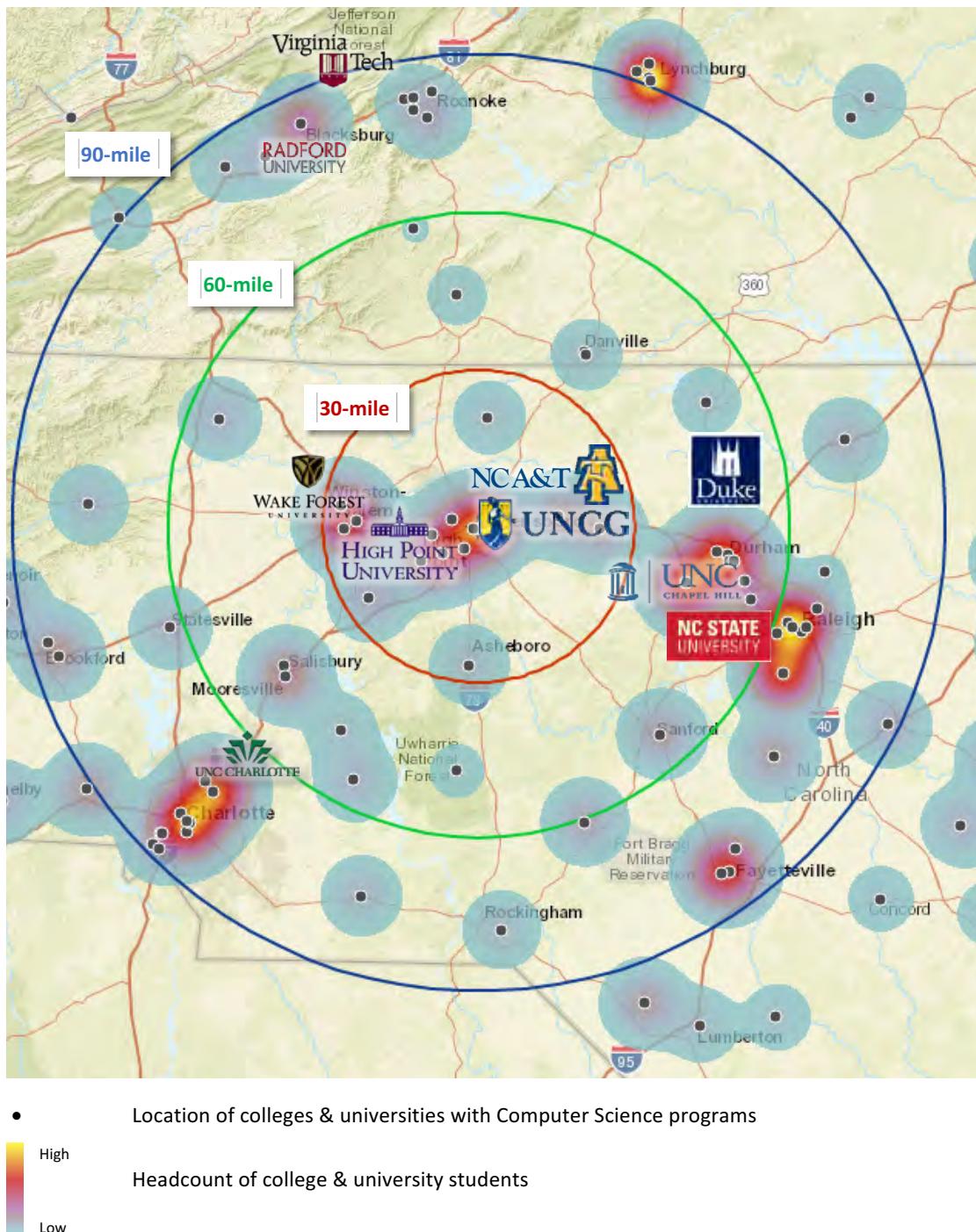
Drivetime Labor Force 2017	60-Minutes
Labor Force	863,529
Employed	811,247
Unemployment	6.1%

## Existing Commuting Patterns

Resident County	Number of Commuters
Alamance	7,447
Caswell	825
Davidson	29,079
Davie	6,859
Randolph	19,040
Rockingham	12,055
Stokes	10,045
Surry	4,883
Yadkin	5,353

# IT Talent

Colleges & Universities Offering Computer Science Degrees



The area is home to 21 colleges, universities and community colleges with more than 100,000 undergraduate students. Within 90 miles, 55 schools offer computer science degrees. In North Carolina alone, nearly 7,000 students earned degrees or certificates in Computer and information Sciences and Engineering. Across the state, students enrolled in IT related programs exceeds 12,000. Our education system is an incredible asset for recruitment.

## North Carolina Computer Science Degrees Conferred 2016

Degrees Conferred 2016	Associate or Certificate	Bachelor's	Master's	Doctorate or Professional	Total
Computer and Information Sciences	3,572	1,521	1,103	76	6,272
Communications Technologies	215	34	-	-	249
Computer Engineering	-	185	131	4	320
Cyber Security	20	-	-	-	20
	<b>3,807</b>	<b>1,740</b>	<b>1,234</b>	<b>80</b>	<b>6,861</b>

## IT & Related Program Enrollment

2015 Fall Enrollment	Total
Computer Science	5,223
Mathematics and Computer Science	120
Computer Engineering	421
Computer Information Systems	239
Cyber Security Professional	7
Electrical and Computer Engineering	2,194
Information and Computer Technology	204
Information Science	188
Information Systems & Technology	817
Information Technology	149
Software and Information System	360
Mathematics & Statistics	593
Mathematics (Individual)	774
Statistics (Individual)	299
Media Studies/Graphic Technology	434
<b>Total</b>	<b>12,022</b>

## Triad Talent

### Existing Talent Employed in the region in all types of occupations:

Title	Employment	Avg. Annual Wages <sup>1</sup>
Management	38,212	\$119,100
Business and Financial Operations	31,136	\$67,500
Computer and Mathematical	13,123	\$80,700
Architecture and Engineering	9,595	\$73,900
Life, Physical, and Social Science	4,215	\$62,400
Community and Social Service	9,823	\$43,300
Legal	4,274	\$104,900
Education, Training, and Library	41,996	\$45,500
Arts, Design, Entertainment, Sports, and Media	10,604	\$50,900
Healthcare Practitioners and Technical	47,059	\$75,500
Healthcare Support	24,724	\$27,300
Protective Service	14,221	\$36,000
Food Preparation and Serving Related	65,225	\$20,700
Building and Grounds Cleaning and Maintenance	26,741	\$23,100
Personal Care and Service	24,718	\$23,700
Sales and Related	76,740	\$38,000
Office and Administrative Support	110,649	\$34,600
Farming, Fishing, and Forestry	1,485	\$27,500
Construction and Extraction	30,337	\$38,100
Installation, Maintenance, and Repair	31,796	\$43,800
Production	78,352	\$33,100
Transportation and Material Moving	61,505	\$31,600
<b>Total - All Occupations</b>	<b>756,531</b>	<b>\$43,800</b>

*Average employment for last 4 Quarters through 2nd quarter of 2017*

## Talent pipeline in region

- **Nearly 110,000 undergraduate students enrolled in 21 regional universities, colleges & community colleges**
  - 19 of these schools offer degrees or certificates in computer and information sciences, computer engineering, and other IT studies.
  - Across the state, more than 100 colleges & universities offer degrees or certificates in computer and information sciences, computer engineering, and other IT studies.
- **There are 237,049 students enrolled in K-12 schools across the Triad.**
  - School systems in the region have nationally recognized schools including magnet programs, International Baccalaureate, as well as early or middle colleges. Magnet schools offer unique opportunities through focused classes and increased access to technology in areas such as STEM, Global & Cultural Studies, Arts, and College & Career Readiness.
  - A program in the region offers last-dollar scholarships to public school students to attend North Carolina University System schools and partner private schools including Caltech, MIT, and Princeton University.
- **There are additional schools, programs, and boot camps that offer instruction in IT and programming to build the regional talent pool.**
  - Coder Foundry has programs in NY and NC with a campus in the Triad teaching 18-week and 12-week intensive computer programming courses
  - Programming4Girls holds summer camps geared towards girls in grades 6-9 with workshops in 3D programming interface
  - Tech Talent South has a code school in the Triad with 8-week code immersion programs and a variety of advanced training such as Next Level Rails



# Graduate Talent Diversity

A key advantage of locating in North Carolina is being able to draw upon a diverse workforce. North Carolina's recent college graduates reflect melting pot of talent that aligns with Amazon's corporate commitment to gender equality and racial diversity. The below table outlines how recent graduates from the state's public institutions of higher education represent an inclusive workforce pipeline.

## Demographics of Recently Employed College Graduates (2015)<sup>1</sup>

### Universities (Public) and Community Colleges

Occupation Title	% Female	% Minority <sup>2</sup>
<b>Management, Administration, and Operations</b>		
Accountants and Auditors	59%	27%
Financial Analysts	34%	30%
Financial Managers	33%	28%
General and Operations Managers	48%	31%
Human Resources Managers/Specialists	75%	44%
Management Analysts	49%	31%
Managers, All Other	56%	32%
Market Research Analysts	47%	*
Marketing Managers	47%	*
Sales Managers	49%	31%
<b>Technology and Information Systems</b>		
Computer Network Architects	24%	34%
Computer Network Support Specialists	18%	35%
Computer Programmers	19%	34%
Computer Systems Analysts	25%	33%
Computer Systems Managers	25%	35%
Database Administrators	24%	*
Information Research Scientists	26%	35%
Information Security Analysts	22%	34%
Network Administrators	21%	*
Software Developers, Applications	22%	35%
Software Developers, Systems Software	24%	34%
Web Developers	17%	35%

\* Data suppressed to maintain confidentiality.

<sup>1</sup> Data sourced from the Common Follow-Up System (CFS) via NC Commerce.

<sup>2</sup> Minority is defined as the percentage of graduates in 2015 with the following classifications: African American, Hispanic, Indian, and Hawaiian/Pacific Islander.

## Skilled Workforce in North Carolina

North Carolina offers one of the most renowned education and workforce development systems in the world, supplying a pipeline of skilled workers that are crucial to the success of global technology headquarters. More than 132,000 North Carolina residents make up the state's robust and growing IT workforce. Global software companies, such as Citrix and Red Hat, have cited access to highly-skilled talent as a strategic differentiator in their decision to locate in North Carolina.

**“North Carolina has been a strategic partner to Red Hat for more than a decade. The talent base we’ve been able to attract headquartered in North Carolina has been phenomenal.”**

*– Jim Whitehurst, President and CEO, Red Hat*

## Community Colleges & NCWorks

The North Carolina Community College System (NCCCS) is widely regarded as offering some of the most comprehensive and advanced technical and vocational programs in the U.S. Additionally, NCWorks provides a free, customized job recruiting and training program for new and expanding businesses. Comprehensive training via NCCCS's extensive catalogue of programs as well as customized curricula tailored to address specific needs of local businesses and industry is available.

NCWorks Career Centers partner with businesses to provide free recruitment and screening services to quickly fill critical openings. In addition to these services, NCWorks offers specialized programs that assist with hiring and training youth and veterans. NCWorks has trained nearly 37,000 employees from 940 companies across the state.



A photograph of a person with long blonde hair, wearing a blue shirt, sitting at a desk. They are looking down at a spiral-bound notebook, holding a pen. On the desk are a laptop, a small white bowl, and a pen. In the background, a window shows a landscape with trees and a body of water.

# PARTNERSHIPS

Greensboro, High Point and Winston-Salem consistently work together and partner with its many universities across the region. There are many programs, including those listed below, joining research, business, workforce and innovation.

- **Opportunity Greensboro:** A Business and Collegiate Partnership of the business and higher education leaders who are working to further the connections between businesses and the area's colleges and universities. Opportunity Greensboro focuses on four areas that leverage Greensboro's academic strengths into success: marketing, common programs, entrepreneurship, and K-12 education. The group's first projects included the launch of The STEM Early College at NC A&T and the shared downtown Union Square Campus.
- **Wake Forest Innovation Quarter:** One of the fastest-growing urban-based districts for innovation in the United States, the Innovation Quarter is home to more than 150 companies, five leading academic institutions, more than 3,600 workers, 1,522 degree-seeking students and over 8,000 workforce trainee participants.
- **Union Square Campus:** A partnership between Cone Health, Guilford Technical Community College, North Carolina A&T State University, and the University of North Carolina at Greensboro. The collaborators worked closely together to create a state-of-the art setting to educate nurses from the associate (2-year), bachelor (4-year) through the doctoral degree level.
- **Virginia Tech - Wake Forest University School of Biomedical Engineering & Sciences (SBES):** A joint graduate program, bringing together three prestigious academic institutions: the College of Engineering at Virginia Tech, the Wake Forest School of Medicine, and the VA-MD Regional College of Veterinary Medicine. Each of these separate entities contributes unique strengths to the combined enterprise. Students graduating from SBES earn a diploma carrying the names of two major universities - Virginia Tech and Wake Forest.
- **Joint School of Nanoscience and Nanoengineering:** A joint collaboration between NC A&T and the University of North Carolina at Greensboro (UNCG), the Joint School of Nanoscience and Nanoengineering (JSNN) offers M.S. and Ph.D. in Nanoengineering as well a Professional M.S. and Ph.D. in Nanoscience. The school launched the Nanomanufacturing Innovation Consortium giving corporate members access to equipment and research opportunities.
- **Power of Potential:** The history of partnerships between corporate and academic institutes in our area speaks to the great possibility of creative collaborations for Amazon and the colleges and universities in the Triad.
- **High Point University's Access to Innovators Series:** Gives students a chance to meet with global innovators and thought leaders including people like; Biz Stone, Marc Randolph, and Steve Wozniak. Steve Wozniak is now an Innovator in Residence who has ongoing visits to campus where he connects with students and faculty through a variety of hands-on projects and acts as a consultant, teacher, and motivator.
- **Connect NC:** In March 2016, North Carolina voters passed a "Connect NC" bond referendum worth \$2 billion dollars. Passage of the bond, which received widespread public approval, symbolizes the state's commitment to making investments in infrastructure and education. Proceeds from the bond are being invested across the state to upgrade infrastructure, education facilities, and state parks. Funds are also being used to make major capital improvements at the high school, community college, and university level. One billion in funding has been allocated to construct or renovate education buildings with a focus on science, technology, and engineering and bolster STEM programs.

# Colleges & Universities in the Triad Region

Institution	Enrollment 12-Month Unduplicated Headcount (2015-2016)			Degrees Awarded (2016)			
	Undergrad	Graduate	Total	Associate & Certificate	Bachelor's	Master's	Doctor's
Bennett College	641		641		78		
Elon University	6,111	867	6,978		1,342	146	141
Greensboro College	1,024	93	1,117		157	6	
Guilford College	2,150		2,150		430		
High Point University	4,556	281	4,837		859	62	11
John Wesley University	138	41	179	1	21	10	6
North Carolina A & T State University	10,489	1,769	12,258		1,503	434	49
Salem College	977	205	1,182	3	187	31	
University of North Carolina at Greensboro	18,592	4,137	22,729		2,888	875	151
University of North Carolina School of the Arts	873	116	989		168	46	
Wake Forest University	4,966	3,364	8,330		1,149	875	353
Winston-Salem State University	5,573	485	6,058		1,121	123	30
Alamance Community College	6,562		6,562	946			
Davidson County Community College	5,237		5,237	1,443			
Forsyth Technical Community College	12,238		12,238	1,691			
Guilford Technical Community College	16,522		16,522	2,554			
Randolph Community College	3,605		3,605	764			
Rockingham Community College	2,409		2,409	410			
Surry Community College	4,275		4,275	697			
South University-High Point	632	85	717	0	61	23	
Virginia College-Greensboro	765		765	202			
<b>TOTALS</b>	<b>108,335</b>	<b>11,443</b>	<b>119,778</b>	<b>8,711</b>	<b>9,964</b>	<b>2,631</b>	<b>741</b>

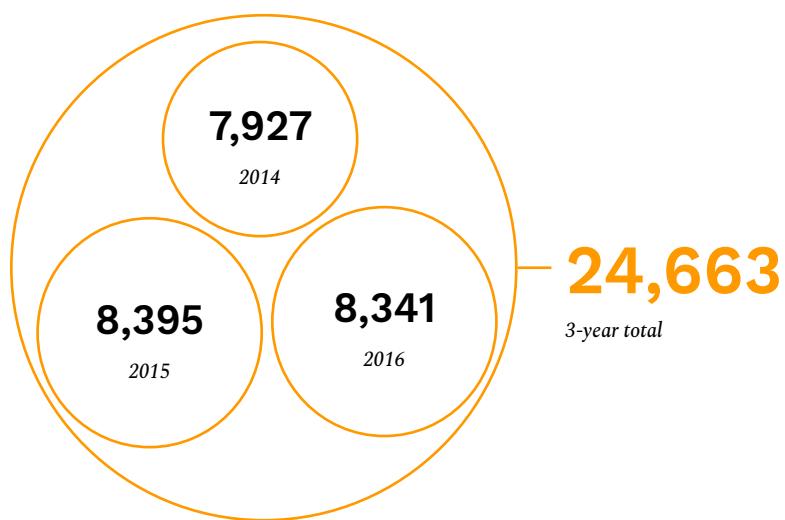
\* Including professional certifications between 1 and 4 years

Source: National Center for Education Statistics

## Colleges & Universities in the Triad Region with Relevant Degrees

All 21 Colleges and Universities in the Triad Region have relevant degrees for Amazon HQ2 operations. From Accounting, Business Management, to Cyber Security and Computer Engineering, there is a school in the region with the program. The infrastructure exists to grow programs at area schools and also supply specialized training through the community college system whether it is computer science or leadership development. More than 24,000 degrees were granted over the last three years in relevant fields in the Triad alone. Across the state and in a 90-mile radius, educational institutions abound including well known North Carolina State University, Virginia Tech, Duke, and the University of North Carolina at Chapel Hill.

## Students Graduating with Amazon HQ Relevant Degrees



### Areas of study include:

- Accounting
- Communications Technologies
- Business Administration & Management
- Computer Engineering
- Computer Programming/ Software Engineering
- Cyber/Computer Forensics
- Computer and Information Sciences
- Data Analytics/ Data Science
- Finance
- Graphic Communications
- Human Resources Management
- Law & Support Services
- Marketing
- Public Relations
- Statistics
- Transportation and Materials Moving

## Experience Digital Triad

**Fiber & Dark Fiber:** The area has more than 200 miles of municipal fiber with capacity for speeds up to 40gbps and dark fiber availability.

### Access to major fiber providers:

- AT&T
- North State Communications
- Verizon
- MCNC
- Level 3
- Spirit Communications



**TriGig:** The TriGig Regional High-Speed Broadband Initiative is a public- private partnership with internet service providers to make available access to a common pool of assets, services, and infrastructure to support the deployment of gigabit speed broadband throughout our community.



**Regional Connections:** Triad Connected Cities seeks to establish fiber connectivity between cities along the I-40/85 corridor promoting economic and business development, education, research, regional healthcare, public safety and other quality of life components of the region.

## K-12 Education

There are 237,049 students enrolled in K-12 schools across the Triad. School systems in the region have nationally recognized programs including:

- Science, Technology, Engineering and Mathematics
- International Baccalaureate
- Global Studies
- Early or middle colleges

North Carolina's K-12 students represent a rich and diverse long-term employment pipeline for technology companies like Amazon. The state's primary and secondary schools are highly ranked for quality and safety,<sup>3</sup> including 52 high schools recognized for excellent academic outcomes by US News.<sup>4</sup> School systems across the state have made long-term commitments to curriculums that emphasize STEM education. Those investments are one reason why North Carolina's students rank 7th in the nation for academic performance based on National Assessment of Educational Progress (NAEP) composite scores.<sup>5</sup> North Carolina's public-school system has established a career clusters system which prepares students for completing degrees at the community college or university level. As of 2017, 9,760 students were enrolled in the information technology career cluster. Growing interest in technology careers is reflected by how many students are taking advanced technology courses at the high school level:

### **Selected Technology Course Enrollment<sup>6</sup> High Schools (Public)**

Course Name	Enrollment (2017)	Growth % (2013–2017)
AP Computer Science Principles	1,036	218%
AP Computer Science <sup>7</sup>	1,537	59%
Computer Programming I	4,013	48%
Computer Programming II	741	<1%
Introduction to Computer Science <sup>8</sup>	439	620%

<sup>3</sup> 2017 States with the Best & Worst School Systems, WalletHub.

<sup>4</sup> National Rankings – Best High Schools, US News & World Reports.

<sup>5</sup> The NAEP does not release a state-level ranking of performance, but third-party studies have ranked North Carolina as 7th in the nation for academic performance.

<sup>6</sup> Data sourced from the North Carolina Department of Public Instruction.

<sup>7</sup> Data are unavailable for the 2013-2014 academic year. Percentage growth is from 2014-2015 through 2016-2017.

<sup>8</sup> This course started in the 2015-2016 academic year. Percentage growth is from 2015-2016 to 2016-2017.

The educational systems of the Triad have been very responsive to business and industry in helping to build a pipeline for students into area companies. An example of how the community and educational institutions are adapting is within the aerospace industry. As several companies have continually grown in the region, area high schools and community colleges have created programs to train students. Andrews Aviation Academy has six tracks of high school study focused on developing aerospace skills. Guilford Technical Community College and Forsyth Technical Community College have built centers and programs for aerospace study and supported apprenticeship opportunities for students. A similar program can be developed to meet Amazon's training needs.



# TRANSPORTATION

## Highways

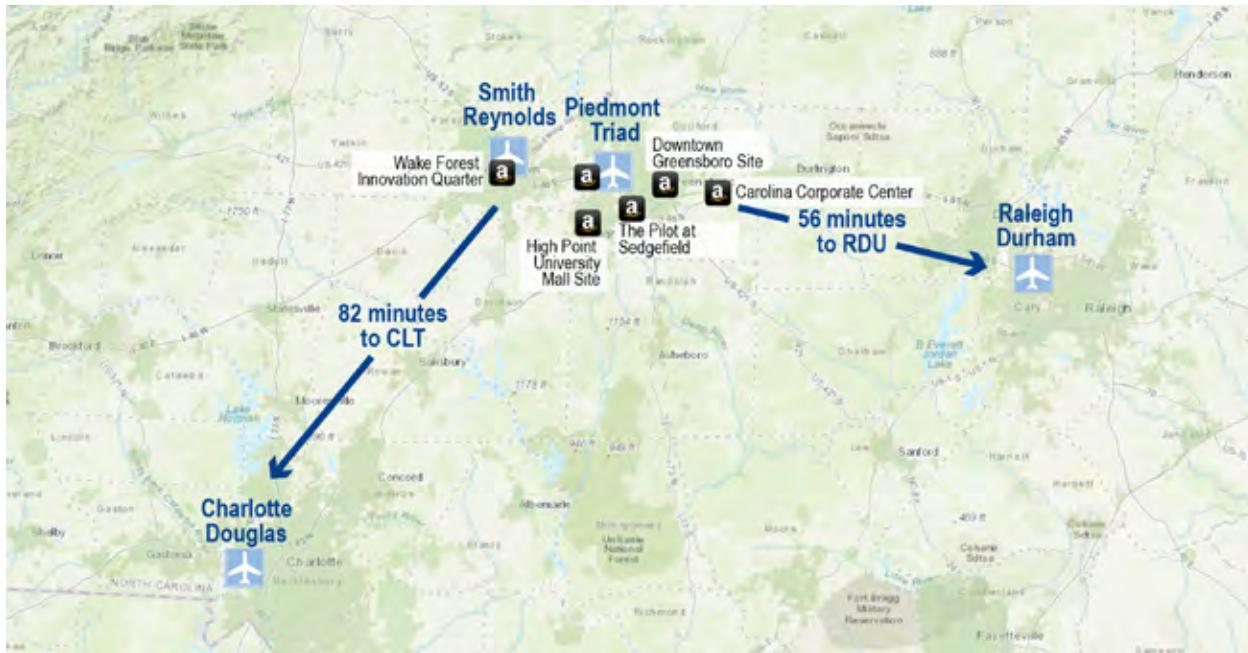
Centrally located, the Triad is situated along I-85 and I-40 providing ample access to major urban areas across the state and along the East Coast. Midway between Atlanta & Washington DC, Miami and New York, the connectivity of the Triad is exemplary.

## Major Interstates



## Distance Map





## Airports

**Three major airports within 90 minutes of all sites:**

- Piedmont Triad International Airport (GSO)
- Charlotte Douglas International Airport (CLT)
- Raleigh-Durham International Airport (RDU)

## Piedmont Triad International Airport (GSO)

Piedmont Triad International Airport is part of a 4,000-acre campus, home to at least 50 companies employing more than 5,000 people. The Piedmont Triad International Airport offers outstanding passenger experience with direct flights and one stop flights to nearly everywhere you need to go. The airport offers easy access where one can check-in and get off the ground faster than most people can get to an airport in large metro areas.

Airport	Location	Direct Daily Flights
CLT	Charlotte, NC	9
ATL	Atlanta, GA	9
LGA	New York, NY	7
PHL	Philadelphia, PA	5
DCA	Washington, DC	3
ORD	Chicago, IL	7
EWR	Newark, NJ	4
DFW	Dallas, TX	2
DTW	Detroit, MI	3
IAD	Dulles, VA	2
MIA	Miami, FL	1
SFB	Sanford, FL*	2
PIE	Clearwater, FL*	2
DEN	Denver, CO**	1

\* Weekly   \*\* Seasonal daily flights

## Logistics

From an infrastructure standpoint, the region offers a strategic advantage with multiple Interstates converging in the Triad. As such, the Triad Region is well established as an East Coast hub for logistics and transportation companies.

- The FedEx Express Mid-Atlantic Air Hub, located at Piedmont Triad International Airport has the capacity to sort 24,000 packages per hour.
- FedEx Ground constructed and expanded its southeast sort facility on a 125-acre site along I-40
- The UPS Ground facility sorts over 44,000 packages per hour
- The Triad region features one of the largest concentrations of trucking companies on the East Coast as well as excellent trailer availability.
- Extensive rail service is provided by Norfolk Southern and CSX

The region is well-tuned for supply chain and distribution. Major distribution centers call the Triad home, including: Ralph Lauren, Procter & Gamble, XPO Logistics, Inmar, O'Reilly Automotive, Inc, and Replacements Inc. Training programs through Guilford Technical Community College, NC A&T State University, UNC-Greensboro, and High Point University provide an educated workforce for logistics and supply chain management.

- North Carolina A&T State University is home to a nationally recognized Transportation Institute
- The University of North Carolina at Greensboro offers a Post-Baccalaureate Certificate in Supply Chain Logistics and Transportation Management
- Guilford Technical Community College provides a Global Logistics Technology program and has simulation space for warehousing and distribution.



## Transit Options

The ease of travel throughout the region provides an easy commute for Triad residents. Major Interstates and connectors manage traffic well with predominately uncongested roads. The area was ranked third in the nation by WalletHub for the Best Cities to Drive In. In addition to singular drivers, there are options for workers to commute to work.

- Regional transit group – PART – offers express buses, vanpools, and carpool connections.



- Local bus systems tie into the PART Regional system delivering workers to locations across the region as well as downtown hubs. This system will be greatly enhanced to meet Amazon's site needs.
- Commuter rail options with five trains daily from Raleigh, NC to Charlotte, NC passing through the region with last mile bus-rail partnerships.
- Development of trails throughout the region, particularly in the urban areas will provide biking opportunities to most sites and link universities, business and retail areas.



# QUALITY OF LIFE

When you talk to professionals and families in the Triad Region, home to the cities of Greensboro, High Point, and Winston Salem, the sentiment expressed across the board is the outstanding quality of life. There are many reasons companies continue to call the Triad “home.” We’re happy to share the rich Quality of Life the Triad Region has to offer and why Amazon would love it as well. As you’ll see, Quality of Life combines access to ranked universities, excellent K-12 programs, well-loved arts and entertainment venues, year-round sports and recreation opportunities, and world-class healthcare.

This region is just two hours from the mountains of North Carolina and three hours from the beaches of our state. Our region is committed to parks, gardens and green spaces. With hundreds of trails in urban and natural settings, the ability to enjoy nature and commute certainly exists here. Recreational opportunities can be found outdoors at lakes, golf courses, woods, trails and parks.







## Diversity of Housing Options

The geographic diversity of the region allows for Amazon employees to live in a variety of settings from urban lofts, walkable neighborhoods, suburban neighborhoods, rural communities – or even on horse farms. Housing can be found within a wide range of price-points and characteristics.



**The average sale price of a home in the area and average monthly rental rates are as follows:**

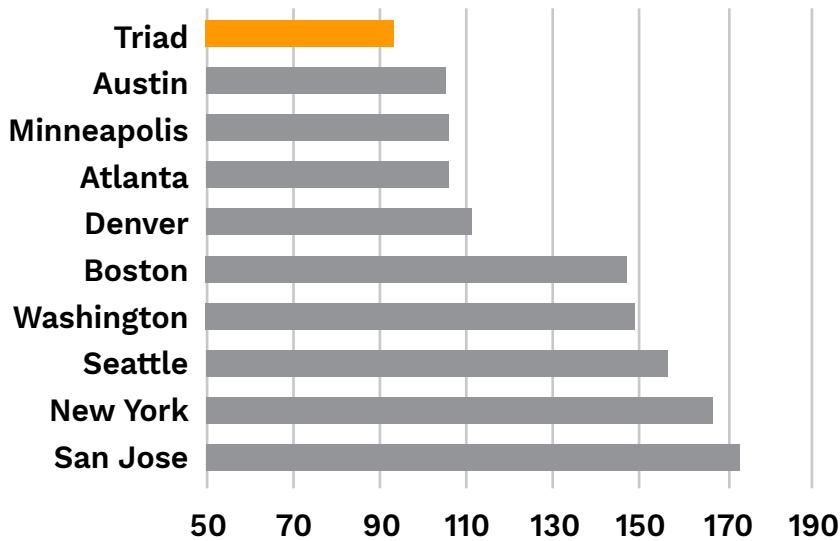
Houses, Condos and Townhomes	Home Sales Prices	Monthly Rental Rates
1 Bedroom		\$700
2 Bedroom	\$102,000	\$810
3 Bedroom	\$161,000	\$1,127
4+ Bedroom	\$294,000	\$1,520
Average for all homes	\$182,000	\$1,039

#### **Crime Rate per 100,000 population (2015)**

	Region	North Carolina	United States
Violent Rate	389.02	356.3	373.7
Property Rate	3,025.67	3,173.60	2,500.50

*Uniform Crime Reports: North Carolina SBI, FBI*

#### **Cost of Living Index**



*Source: Areavibes; cost of living data is derived from the Council for Community and Economic Research (C2ER) for the fourth quarter of 2016*

# STATE ENDORSEMENTS

**Congress of the United States**  
**Washington, DC 20515**

October 13, 2017

Mr. Jeffrey P. Bezos  
Founder and Chief Executive Officer  
Amazon.com, Inc.  
Office of Economic Development  
c/o Site Manager Golden  
2121 7<sup>th</sup> Avenue  
Seattle, Washington 98121

Dear Mr. Bezos:

North Carolina is home to several high-growth communities, each of which would be excellent locations for Amazon's new headquarters. As members of North Carolina's Congressional delegation, we wish to offer our support for locating your new headquarters in our state, and extend the offer to provide any information you might need as to why North Carolina is an ideal place for Amazon to call home.

One of the best indicators of North Carolina's reputation as a magnet for businesses and families is our nation-leading growth. Since 2010, our population has grown by 6.4%, with last year's net growth outpacing that of the nation overall. Hundreds of thousands pick up and move to North Carolina for our climate, commitment to education, and wonderful business environment. The evidence is clear as the number of those identifying as "North Carolinians" increases every day.

We also understand Amazon will need to draw from a pool of talented, highly-skilled workers. North Carolina's world-class research universities produce much of the talent that fuels the robust technology sector that already exists in the state, with more than 125,000 North Carolinians working in the industry. In addition, North Carolina is the highest ranked state for women in the tech sector, and second in Southeast U.S. for STEM program completions. For these, and many more, reasons, we believe North Carolina is an ideal home for Amazon. As you work to narrow down the possibilities across the country for this impressive headquarters plan, please do not hesitate to contact any member of the North Carolina delegation if we can provide you or your team with additional details about the state.

We look forward to working with you on this exciting opportunity.

Sincerely,



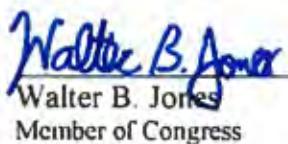
Richard Burr  
United States Senator

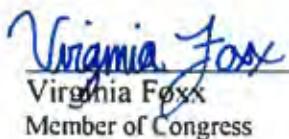


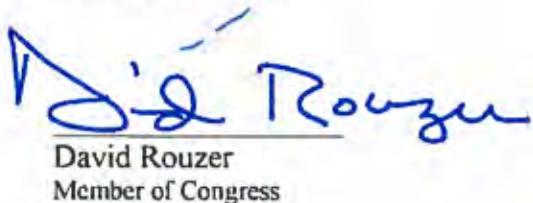
Thom Tillis  
United States Senator

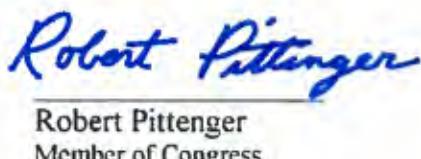
Mr. Bezos  
October 13, 2017  
Page Two

  
G. K. Butterfield  
Member of Congress

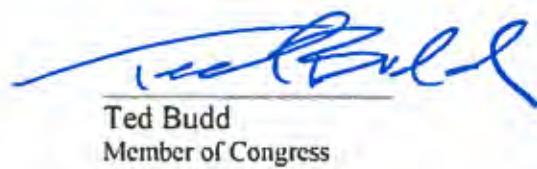
  
Walter B. Jones  
Member of Congress

  
Virginia Foxx  
Member of Congress

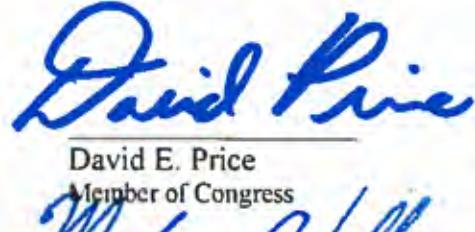
  
David Rouzer  
Member of Congress

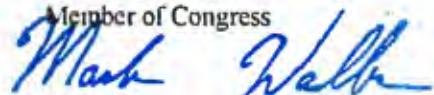
  
Robert Pittenger  
Member of Congress

  
Mark Meadows  
Member of Congress

  
Ted Budd  
Member of Congress

  
George Holding  
Member of Congress

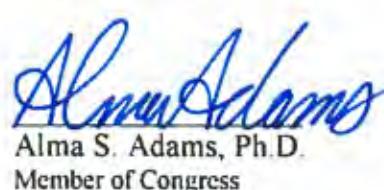
  
David E. Price  
Member of Congress

  
Mark Walker

Mark Walker  
Member of Congress

  
Richard Hudson  
Member of Congress

  
Patrick McHenry  
Member of Congress

  
Alma S. Adams, Ph.D.  
Member of Congress

*Office of the Governor  
State of North Carolina*

*Roy Cooper  
Governor*



*20301 Mail Service Center  
Raleigh, N.C. 27699-0301*

October 5, 2017

Mr. Jeff Bezos, Founder & Chief Executive Officer  
Amazon.com, Inc.  
Office of Economic Development  
c/o Site Manager Golden  
2121 7<sup>th</sup> Avenue  
Seattle, WA 98121

Dear Jeff:

For years, North Carolina has been known as the State of Minds, and that's why we offer the ideal location for HQ2.

For the past half-century, we have invested heavily in human capital, from creating an early childhood program that has been a model for most states, to nurturing a community college and university system that has transformed laborers into geeks and tech trailblazers.

North Carolina's commitment to education is in our bloodstream. We opened the nation's first public-university in Chapel Hill, N.C., in 1795. My administration is working to make North Carolina a Top 10-Educated State by 2025. There is nothing more important to me than making meaningful, measurable investments in education from birth through college and throughout a person's career. In North Carolina, education is synonymous with opportunity, and that's why we cherish it so much.

North Carolina has earned a reputation for cool, and that's why we are attracting young people. Only three states have higher in-migration. And our people are diverse. The children in most of our urban public schools live in homes that speak nearly 100 languages or dialects.

North Carolina cities and towns are buzzing with music festivals, street fairs, micro-breweries and sports. The Blue Ridge Parkway and the Outer Banks are within easy reach for a weekend. We must warn you – when people move to North Carolina, they never want to leave.

*Location: The State Capitol Building, Raleigh, N.C. 27602  
Phone: 919-814-2100*

Mr. Jeff Bezos  
October 5, 2017  
Page 2

In North Carolina, we are fervent about growing the infrastructure that companies like Amazon demand. We protect our environment – including three mountain ranges, 300 miles of coast and 38,000 miles of rivers and streams.

Yet North Carolina has built a business-friendly economy that growing companies love. We are consistently recognized as one of the leading states in the nation by publications like *Forbes* and *Chief Executive* magazine.

Finally, I want to tell you that North Carolina is a welcoming state. Like every family with an embarrassing uncle or two, we have a few politicians who want it to be 1957 instead 2017. But here in North Carolina, you'll find authentic people who respect others, who love our families, people who work hard and are loyal to the state in which we live.

The State of Minds is open. We are optimistic. We will provide the ingredients to replicate your Day 1 culture. Let the conversation begin.

With kind regards, I am

Very truly yours,



Roy Cooper

RAC/sm



NORTH CAROLINA GENERAL ASSEMBLY

LEGISLATIVE BUILDING

RALEIGH 27601

October 19, 2017

Mr. Jeff Bezos  
Founder and Chief Executive Officer  
Amazon.com, Inc.  
Office of Economic Development  
c/o Site Manager Golden  
2121 7<sup>th</sup> Avenue  
Seattle, WA 98121

Dear Jeff,

As leaders of the North Carolina General Assembly, we would like to add our support to the proposals from North Carolina communities encouraging you to consider a second Amazon headquarters in our state.

Through our legislative efforts, we are constantly working to make North Carolina the most attractive state in America in which to do business.

Over the last six years, the General Assembly has enacted historic tax reform through multiple reductions and simplifications to our state's corporate and personal income tax rates. Today, businesses in North Carolina enjoy a corporate income tax rate that is already one of the nation's lowest and will be further reduced to 2.5 percent in 2019, along with single sales-factor apportionment that will be fully phased in by 2018. We have also streamlined and lowered the personal income tax rate from a marginal rate of 7.75 percent to 5.25 percent beginning in 2019.

In addition, we recently passed comprehensive legislation to better welcome transformational projects, including an expansion of the state's two major incentive programs for projects planning to create more than 4,000 jobs. We would be open to discussions about further modifications to accommodate a project of your scope and size.

We believe these policies only strengthen North Carolina's reputation as a leader in job growth that counts among its assets its workforce, public education system, infrastructure and unmatched quality of life. Here is where we stand out in just a few of the recent national rankings:

- Most dramatic improvement in the Business Tax Climate Index 's history—from 44th to 15th in one year (Tax Foundation 2015)
- No. 1 Most Competitive State (Site Selection 2015)
- No. 2 Best Business Climate (Site Selection 2015)
- No. 2 Best State for Business (Forbes 2016 )
- No. 3 Best State for Business (Chief Executive 2016)
- No. 3 Lowest State & Local Tax Burden on Business (E&Y/COST 2015)
- No. 4 Best Regulatory Environment (Forbes 2015)
- No. 5 Lowest Business Costs (Forbes 2015)
- No. 5 America's Top States for Business (CNBC 2016)
- Winner of Site Selection's 2016 Prosperity Cup (Site Selection 2016)
- 11<sup>th</sup> Best Tax Climate in the Nation (Tax Foundation 2016)

We trust that you will experience an enviable partnership among the General Assembly, the Governor, the N.C. Department of Commerce and economic development organizations on this effort. We look forward to working with you and your team on further exploring North Carolina as the best location for Amazon's HQ2.

Sincerely,



Phil Berger  
President Pro Tempore  
North Carolina Senate



Tim Moore  
Speaker  
North Carolina House of Representatives



910 Raleigh Rd.  
Chapel Hill, NC 27514

**Constituent Universities**

Appalachian  
State University

East Carolina  
University

Elizabeth City  
State University

Fayetteville State  
University

North Carolina  
Agricultural and  
Technical State  
University

North Carolina  
Central University

North Carolina  
State University  
at Raleigh

University of  
North Carolina  
at Asheville

University of  
North Carolina  
at Chapel Hill

University of  
North Carolina  
at Charlotte

University of  
North Carolina  
at Greensboro

University of  
North Carolina  
at Pembroke

University of  
North Carolina  
at Wilmington

University of  
North Carolina  
School of the Arts

Western Carolina  
University

Winston-Salem  
State University

**Constituent High School**

North Carolina  
School of Science  
and Mathematics

An Equal Opportunity/  
Affirmative Action Employer

October 16, 2017

**Mr. Christopher Chung**  
Chief Executive Officer  
Economic Development Partnership of North Carolina  
15000 Weston Parkway  
Cary, North Carolina 27513-2118

Dear Mr. Chung:

On behalf of The University of North Carolina System, I am pleased to provide this letter of support for North Carolina's proposal to Amazon for the establishment of its planned HQ 2 facility. I'm also pleased to include brief summaries of our 17 constituent institutions demonstrating the scope of instructional capabilities, research strengths, and quality of graduates that would benefit Amazon should it select our state for its HQ 2 site.

My staff and I are fully committed to supporting your effort to present the case for location of the Amazon project in North Carolina. Set forth below are a number of factors that highlight and confirm the role the University has played both in the education of our citizens and in support of economic and community development.

In 1789, North Carolina became the first state to open a public university to students. The legal authority and mandate for the University was set forth in the state's first Constitution which provided, "That a school or schools shall be established for the convenient instruction of youth --- and all useful learning shall be duly encouraged and promoted."

This mandate has guided the development of what is today a System comprised of 16 universities and one of the nation's best public residential high schools of science and math. Our constituent institutions are diverse and vary in size and focus, including several large-scale research intensive campuses, five historically black institutions and a growing number of regional institutions.

Collectively, our institutions enroll more than 225,000 students annually; and, given the continuing, strong in-migration of working age adults, projections for enrollment growth are significant.

Research activities at our 16 campuses currently exceed \$1.3 billion annually. Much of this research activity has been undertaken at our two major research campuses – UNC-Chapel Hill and NC State; but, the level of research activity at NC A&T, UNC Charlotte, ECU and other growing regional campuses is quickly increasing.

All of our institutions are actively engaged with the communities they serve and within the state's economic development infrastructure. Our land-grant institutions (NC State and NC A&T) host highly effective statewide extension services for agriculture, engineering, and small/mid-sized businesses. Our North Carolina Area Health Education network with nine offices statewide is a primary resource for training of health professionals. UNC-TV serves the entire state through 12 public broadcast stations, and it has additional channel capabilities available for expansion. All of our institutions are strongly engaged in our communities – indeed, one of the five goals of the University's Strategic Plan, entitled "Higher Expectations," focuses on the *Economic Impact and Community Engagement* role of our institutions.

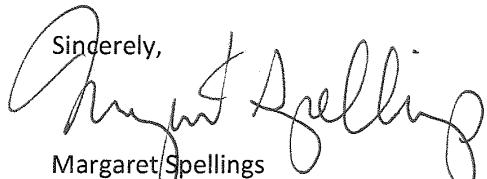
To support the University's role, we host an Economic Transformation Council through our System office. This Council includes a senior representative from each of our 17 institutions. It meets quarterly (or more frequently as needed) to exchange information and ideas related to campus- and System-level initiatives related to community engagement and to economic development projects. Members of this Council, for instance, regularly collaborate with state and local economic development entities to support the recruitment of business projects to North Carolina. They have also collaborated to design new initiatives to address challenges such as job losses as a result of a recession.

With respect to the Amazon HQ 2 project I believe that the University can be helpful and supportive in a number of specific ways, including:

- 1) My office, through our External Affairs Division, can serve as a focal point through which to access System- and campus-based leadership, expertise, and resources that may be most appropriate to support your efforts to recruit Amazon. Our Senior Vice President for External Affairs, Kevin Howell and our Interim Vice President for International, Community and Economic Engagement, Scott Daugherty, are available to you to support your efforts.
- 2) We can provide further detail with respect to current data on total annual graduates by discipline and institution and similar data on sponsored research activities. (see attached 2016 Degrees conferred in Business, Engineering, Information Science and Related Categories).

- 3) We can support your proposal by committing resource support for new curriculum development in support of the Amazon project.
- 4) Through the Economic Transformation Council, we can help you engage with specific campuses within the University to help you better understand the educational programs and research capabilities at those campuses that may be most relevant to your recruitment effort.
- 5) We can co-develop Internship and Apprenticeship opportunities with Amazon.
- 6) We can co-host job fairs with Amazon.
- 7) We can help you leverage community and business resource partners who may be helpful to you in support of the Amazon project.

Chris, we are available to assist you in anyway as you seek to attract Amazon to North Carolina. Please let me know how we can be most helpful to you and your team.

Sincerely,  
  
Margaret Spellings  
President

cc: Tony Copeland, Secretary, North Carolina Department of Commerce  
Roy Cooper, Governor of North Carolina  
Kevin Howell, Senior Vice President External Affairs  
Scott Daugherty, Interim Vice President for International, Community & Economic Engagement



## **NORTH CAROLINA COMMUNITY COLLEGE SYSTEM**

**Ms. Jennifer Haygood**

**Acting President**

October 9, 2017

Ms. Ellen Tai  
Economic Development Partnership of North Carolina  
15000 Weston Parkway  
Cary, NC 27513

Dear Ellen,

I am excited to learn that Project HQ2 is considering locations within North Carolina to establish the company's second Corporate Headquarters operation. As I understand this project, the company plans to create 50,000 full-time positions within a four-phase process over a fifteen-year timeline. The average annual salary of all positions is estimated to be \$100,000, and the capital investment is estimated to exceed \$5 billion and will be executed over the four phases.

The North Carolina Community College System is comprised of 58 community colleges, serving in excess of 720,000 students annually. The System is the third largest in the Nation and has consistently been funded by North Carolina's General Assembly to support education and training since the late 1950's.

Our most recent annual data reflects 36,041 students registering in two-year programs that will support the positions Project HQ2 will need. This includes Accounting; Business Administration; Business Analytics; Computer Engineering, Programming and Technology; Financial Services; Human Resources Management; Information Systems and Security; Legal; Networking; Office Administration; Office Systems Technology; Paralegal; and Project Management.

In addition, our NC Community College System has a strong partnership with the NC University System. For our most recent annual data, we enrolled 36,041 students who plan to obtain a two-year associate degree and transfer to the University System to obtain a bachelor's degree.

I am confident that given our extensive experience partnering with thousands of companies, both domestic and international, along with our resources and flexibility, that no other state offers accessibility to high quality workforce development as does North Carolina. The North Carolina Community College System is known worldwide for the quality and specific focus of our Customized Training Program and other programs that support business development in North Carolina.

Training may include pre-employment training, where candidates experience a short-term realistic job preview, as well as extensive post-employment training that will be customized for Project HQ2. A training plan is developed as a joint effort between representatives from the company, the local community college and the North Carolina Community College System. We are prepared to discuss technical training and soft skills training with your client. We look forward to partnering with Project HQ2 to design and develop a customized plan to meet their specific workforce development requirements for a well-trained and productive workforce that is the equal of any in the world.

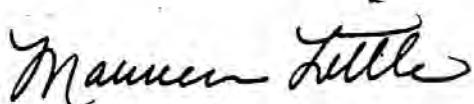
Although it is difficult to determine a dollar value of the training without knowing specific job skills and competencies, I estimate the value of our training support for Project HQ2 to range from \$1,800 to \$2,000 per full-time position created. This does not include fixed costs of existing personnel resources, previous investments in curriculum development, facilities, etc. I also need to mention that this commitment is contingent upon availability of funding, which is based on annual legislative appropriations. However, no other state has as long a period of consistent funding for customized training as has North Carolina.

During the past year, we have worked with over 330 new, expanding, and existing industry clients across North Carolina to design and deliver focused and effective training programs that met their respective needs. Each year well over 96 percent of our clients ranked us as very good or excellent for meeting their training expectations, providing effective service, and for the impact of our training programs on their companies' productivity and performance. This year promises to be even busier and we hope to be able to start planning and implementing some of these activities for Project HQ2.

We are confident our Customized Training Program and the North Carolina Community College System have the fiscal resources and the expertise to provide assistance in developing a comprehensive and genuinely effective customized training program tailored to company needs.

Please know we are committed to a continued partnership with the company and the possibility of future expansion. If you have questions or need clarification on any of this information please feel free to contact me at 919-218-7133, or email me at [littlem@nccommunitycolleges.edu](mailto:littlem@nccommunitycolleges.edu) at your convenience.

Sincerely,

A handwritten signature in black ink that reads "Maureen Little". The signature is fluid and cursive, with "Maureen" on the first line and "Little" on the second line.

Maureen Little  
Vice President, Economic Development

MTL/jmf



## NORTH CAROLINA DEPARTMENT OF MILITARY AND VETERANS AFFAIRS

Roy Cooper  
GOVERNOR

Larry D. Hall  
SECRETARY

October 2, 2017

North Carolina is the proud home of the 3rd largest military community in the United States. With over 100,000 active duty members, over 22,000 guardsmen, and over 775,000 veterans, we have a strong group of military families, many putting their skills and training to work in the private sector, with an anticipated 20,000 members transitioning out of the service each year.

I have been consistently impressed with Amazon's commitment to veterans and military spouses. From the great strides toward your 25,000 military hires pledge to your deep work with AWS apprentices, you have shown us how much you value the talent in our community. My office, our partners at NC4ME (North Carolina for Military Employment, our state's public-private partnership to support this work), and our bases are all ready and eager to partner with you in this important work.

That partnership could take many forms and we can explore the options together in greater detail. By way of example, here are some of our past experiences and ideas:

- 1. Transition Training:** We work with several technology companies to offer pre-transition training on our bases. At Fort Bragg, we have a pre-transition training center where we would welcome your participation and could offer you space. It would be a phenomenal contribution to our state to set up Amazon-specific or industry-collective training programs together in cybersecurity, IT, and customer support.
- 2. Recruitment:** The North Carolina Division of Workforce Solutions partners with companies hiring our transitioning service members, spouses and veterans, and the division will be thrilled to work with Amazon to do the same. These services range from advertising and events to sourcing and screening candidates. The division has helped our partner companies fill thousands of roles with highly trained veteran talent.
- 3. Remote Work Support:** We are impressed with your dedication to military spouses and your understanding of their need for portable jobs. To alleviate the barriers of access to reliable internet, dedicated work space, and isolation, we are interested in offering free co-working spaces in the cities and towns near bases so that spouses working in remote roles can build relationships with one another and focus on their jobs within a tech-enabled work space.

In partnership with Amazon, North Carolina is prepared to create new and innovative programs both to help Amazon recruit great talent and to help our military community leverage their skills in your company. My team in the Department of Military and Veterans Affairs will serve as the central military liaison for Amazon, coordinating support from all of our bases and partner organizations serving transitioning services members, spouses and veterans.

We look forward to working together to support military hiring at Amazon.

A handwritten signature in blue ink that reads "Larry D. Hall".

Secretary Larry Hall



**GREENSBORO**

**WINSTON-SALEM**

**HIGH POINT**